Informatica

Informatica® Cloud MDM - Customer 360 for Salesforce

Winter 2020 Version 7.00

Setup Guide

Informatica Cloud MDM - Customer 360 for Salesforce Setup Guide
Winter 2020 Version 7.00
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Preface

Follow the instructions in the *Informatica Cloud MDM - Customer 360 for Salesforce Setup Guide* to set up Cloud MDM - Customer 360 for Salesforce (CC360).

This guide is written for administrators who are responsible for installing and updating CC360. This guide assumes that you are familiar with the Salesforce environment.

Informatica Resources

Informatica provides you with a range of product resources through the Informatica Network and other online portals. Use the resources to get the most from your Informatica products and solutions and to learn from other Informatica users and subject matter experts.

Informatica Network

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As an Informatica Network member, you have the following options:

- Search the Knowledge Base for product resources.
- View product availability information.
- Create and review your support cases.
- Find your local Informatica User Group Network and collaborate with your peers.

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Use the Informatica Knowledge Base to find product resources such as how-to articles, best practices, video tutorials, and answers to frequently asked questions.

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If you have questions, comments, or ideas about the product documentation, contact the Informatica Documentation team at infa_documentation@informatica.com.

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Informatica Velocity

Informatica Velocity is a collection of tips and best practices developed by Informatica Professional Services and based on real-world experiences from hundreds of data management projects. Informatica Velocity represents the collective knowledge of Informatica consultants who work with organizations around the world to plan, develop, deploy, and maintain successful data management solutions.

You can find Informatica Velocity resources at http://velocity.informatica.com. If you have questions, comments, or ideas about Informatica Velocity, contact Informatica Professional Services at ips@informatica.com.

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You can contact a Global Support Center by telephone or through the Informatica Network.

To find your local Informatica Global Customer Support telephone number, visit the Informatica website at the following link:
https://www.informatica.com/services-and-training/customer-success-services/contact-us.html.

To find online support resources on the Informatica Network, visit https://network.informatica.com and select the eSupport option.

CHAPTER 1

Installing Cloud MDM - Customer 360 for Salesforce

This chapter includes the following topics:

- Installing Cloud MDM - Customer 360 for Salesforce Overview, 7
- Before You Begin, 7
- Installing CC360, 7
- Post-Installation Tasks, 9

Installing Cloud MDM - Customer 360 for Salesforce Overview

Cloud MDM - Customer 360 for Salesforce (CC360), is a master data management application that runs on your Salesforce organization within Force.com. You can also configure Cloud MDM - Customer 360 for Salesforce to integrate with Informatica Data as a Service (DaaS), and verify addresses, email addresses, and phone numbers of records. When you download the Cloud MDM - Customer 360 for Salesforce application, you receive an email that contains the link to the package installation. Use the link in the package installation email to install CC360.

Before You Begin

Download the CC360 application from the Salesforce AppExchange site. When you download the application, you receive an email with the link to the CC360 package and a password for the installation.

Installing CC360

CC360 installation includes installing and activating CC360. Use the link in the package installation email to install CC360. After the installation, activate CC360 to access the CC360 features. If you want to use only

DaaS, you do not need to activate CC360. To use DaaS, enable the address verification, email address verification, and phone number validation services.

1. Install and activate CC360.
2. Complete the CC360 setup.

Step 1. Install and Activate CC360

Use the installation link in the welcome email. After the installation, activate CC360 to access the CC360 features.

1. In the welcome email, click the CC360 installation link.

   If you want to install CC360 to a sandbox environment, change the first portion of the link from `https://login.salesforce.com` to `https://test.salesforce.com`.

   The **Package Installation Details** password page appears.
2. Enter the installation password and click **Submit**.

   The **Package Installation Details** description page appears.
3. Click **Continue**.

   The **Package Installer Approve Package API Access** page appears.
4. Configure all objects to have read, create, and edit permission, and click **Next**.

   The **Package Installer: Choose Security Level** page appears.
5. Select **Grant Access to all users** and click **Next**.

   If required, you can change the security level after the package installation.

   The **Package Installer: Install Package** page appears.
6. Ignore if any Apex test failures occur and click **Install**.
7. From the **Setup** section of the **CC360 Admin** tab, click **Run the Setup Wizard**.
8. To enable the Informatica Address Verification service, perform the following tasks:
   a. In the **Service Setup** section, click **Address Verification**.
   b. In the **Service Information** section, enable Informatica Address Verification service.
   c. Enter the authentication credentials to access the address verification service.
   d. Click **Save**.

      Test Connection is enabled.
   e. To test the connection with the Address Verification service, click **Test Connection**.

   For more information about configuring the Informatica Address Verification settings, see the *Informatica Cloud MDM - Customer 360 for Salesforce Administrator Guide*.
9. To enable the Informatica Email Address Verification service, perform the following tasks:
   a. In the **Service Setup** section, click **Email Address Verification**.
   b. In the **Service Information** section, enable Informatica Email Address Verification service.
   c. Enter the authentication credentials to access the email address verification service.
   d. Click **Save**.

      Test Connection is enabled.
   e. To test the connection with the Email Address Verification service, click **Test Connection**.

   For more information about configuring the Informatica Email Address Verification settings, see the *Informatica Cloud MDM - Customer 360 for Salesforce Administrator Guide*.

10. To enable the Informatica Phone Validation service, perform the following tasks:
    a. In the **Service Setup** section, click **Phone Number Validation**.
    b. In the **Service Information** section, enable Informatica Phone Validation service.
    c. Enter the authentication credentials to access the phone number validation service.
    d. Click **Save**.

       Test Connection is enabled.
    e. To test the connection with the Phone Validation service, click **Test Connection**.

    For more information about configuring the Informatica Phone Validation settings, see the *Informatica Cloud MDM - Customer 360 for Salesforce Administrator Guide*.
11. To activate CC360, perform the following tasks:
    a. Click **Activate CC360**.

       The **License Activation** page appears.
    b. Enter the activation code.
    c. Click **Submit**.

Step 2. Complete the Setup for CC360

To complete the setup for CC360, create a data set named Active with **Setup Completed** enabled.

1. Based on the Salesforce environment that you use, perform one of the following tasks:
   - In Salesforce Classic, perform the following tasks:
     1. In the upper-right corner of the page, select your name, and click **Setup**.
     2. Under **App Setup**, click **Develop** > **Custom Settings**.
   - In Lightning Experience, perform the following tasks:
     1. Click the quick access menu ( ), and then click **Setup**.
        The **Setup Home** page appears.
     2. Under **PLATFORM TOOLS**, click **Custom Code** > **Custom Settings**.

   The **Custom Settings** page appears.
2. Select **Manage** for **CC360 Settings**.

   The **Custom Setting CC360 Settings** page appears.
3. Click **New**.

   The **CC360 Settings Edit** page appears.
4. In the **Name** text box, enter `Active`.
5. Select **Setup Completed** and click **Save**.

Post-Installation Tasks

After you complete the installation of CC360, you must perform the following tasks:

1. Enable Lightning Experience.

2. Perform initial synchronization.

If your organization uses Salesforce Shield Platform Encryption to encrypt fields, do not encrypt the Account Name and Contact Name fields because CC360 does not support encryption of the Account Name and Contact Name fields.

Enabling Lightning Experience

You must enable Lightning Experience to access the CC360 features in Lightning Experience. Enablement of Lightning Experience includes enabling My Domain, disabling LockerService, and configuring a custom tab.

1. Add a custom domain to your Salesforce organization URL with the My Domain Salesforce feature. You must enable My Domain to use CC360 custom Lightning components. You must also deploy the domain to the users.
2. If you have Salesforce LockerService enabled in your organization, disable the LockerService to use CC360 custom Lightning components.

   Note: LockerService isn't enabled for components with API version 39.0 and lower, which covers any component created before Summer '17.
3. Create a custom tab to access the Lightning components.
   You can create a tab to access the record creation page.
4. Add the custom tab to the Cloud MDM - Customer 360 for Salesforce application.

Creating a Custom Tab to Access the Lightning Components

You can create a custom tab for the Lightning Scout component to access Lightning components.

1. In Lightning Experience, click the quick access menu ( ) and then click **Setup Home**.

   The **Setup Home** page appears.
2. Under **PLATFORM TOOLS**, click **User Interface** > **Tabs**.
3. In the **Lightning Component Tabs** section, click **New**.

   The **New Lightning Component Tab** page appears.
4. Perform the following tasks:
   a. Select the Lightning component for which you want to create the tab.

      For the record creation page, select `DSE:DS_LT_CC360_ScoutComponent`.
   b. Enter a label for the tab.

      The tab name gets automatically populated when you click the field. You can also enter a different tab name.
   c. Select a tab style.
   d. Optionally, enter a description for the tab.
   e. Click **Next**.
   f. Select the user profiles for which the tab must be available.
   g. Click **Save**.

Adding the Custom Tab to the Cloud MDM - Customer 360 for Salesforce Application

You must add the custom tab that you created to the Cloud MDM - Customer 360 for Salesforce application to access custom Lightning components.

1. In Lightning Experience, click the quick access menu ( ) and then click **Setup Home**.

   The **Setup Home** page appears.
2. Under **PLATFORM TOOLS**, click **Apps** > **App Manager**.
3. In the **MDM - Customer 360 for Salesforce** row, click the downward arrow, and select **Edit**.
4. From the list of available tabs, select the custom tab that you created and move it to the selected tabs.
5. To enable the custom tab, select **Overwrite Users' Personal Custom App Customizations**.
6. Click **Save**.

Performing Initial Synchronization

After you install CC360, you must run batch jobs or use a data loader to synchronize the Salesforce records with CC360. When you synchronize the records for the first time, CC360 creates beans and master beans for all records.

You can perform the following initial synchronizations:

- Initial synchronizations for all the existing Salesforce organization records.
  If the Salesforce organization contained records before Cloud MDM - Customer 360 for Salesforce installation, run the Migrate Accounts, Migrate Contacts, and Migrate Leads jobs to create beans and master beans for the records. Run the migrate jobs with the number of concurrent processes set to one.

  For more information about the migrate jobs, see the *Informatica Cloud MDM - Customer 360 for Salesforce Administrator Guide*.
- Initial synchronization for the selected Salesforce organization records.
  Use the Informatica Cloud Services update task to synchronize objects of a specific type, such as objects with an account type of Partner.
- Initial synchronization for the Salesforce organization without existing records.
  Use Informatica Cloud Services or the Apex Data Loader to import the records into Salesforce. CC360 creates beans for all the records during synchronization.

CHAPTER 2

Upgrading Cloud MDM - Customer 360 for Salesforce

This chapter includes the following topics:

- Upgrading Cloud MDM - Customer 360 for Salesforce Overview, 12
- Upgrading CC360, 12
- Post-Upgrade Tasks, 13

Upgrading Cloud MDM - Customer 360 for Salesforce Overview

When a new version of CC360 is available, Informatica sends an email notification. You can upgrade to the latest version of CC360 by installing the upgrade package.

Upgrading CC360

To upgrade CC360, access the Package Upgrade Details and enter your upgrade password.

1. Follow the CC360 upgrade link in the welcome email. If you want to upgrade a sandbox environment, change the first portion of the link from `https://login.salesforce.com` to `https://test.salesforce.com`.

   The **Package Upgrade Details** password screen appears in your web browser.
2. Enter your installation password, and click **Submit**.

   The **Package Upgrade Details** description screen appears.
3. Click **Continue**.

   The **Package Installer Approve Package API Access** page appears.
4. Configure all objects to have read, create, and edit permission, and click **Next**.

   The **Package Installer: Choose Security Level** page appears.
5. Select **Grant Access to all users** and click **Next**.

If required, you can change the security level after the package installation.

The **Package Installer: Install Package** page appears.

6. Ignore if any Apex test failures occur and click **Install**.

Post-Upgrade Tasks

After you upgrade to the latest version of CC360, you must reset the Address Verification related settings for your organization, reset the Customer 360 settings for lead, and optionally, delete the null transaction entries in the EventQueue table.

After you upgrade CC360, perform the following tasks:

1. Reset the Address Verification related settings.
2. Optionally, delete the null transaction entries in the EventQueue table.
3. Reset Customer 360 settings for lead.

Step 1. Resetting the Address Verification Related Settings

CC360 does not require the external adapter to integrate with Address Verification. CC360 programmatically integrates with Informatica Data as a Service to provide the address verification service, the email address verification service, and the phone number validation service.

If you have integrated CC360 with Address Verification, reset the Address Verification related settings configured for your organization.

Use the following sample code in the Salesforce Developer Console to reset the Address Verification related settings:

```
DSE__API_SettingsManager.getConfig('getDataQualitySettings', new List<String> {'Reset'});
```

Step 2. Deleting the Transaction Entries in the EventQueue Table (Optional)

Optionally, delete all the transaction entries in the EventQueue table if the lookup fields of account, contact, and lead are null. The EventQueue table stores the address standardization requests as the transaction entries.

Use the following sample code to retrieve and delete the transaction entries in the EventQueue table if the lookup fields of account, contact, and lead are null:

```
DELETE [SELECT Id from  DSE__DS_Event_Queue__c WHERE DSE__DS_Account__c = NULL AND
DSE__DS_Contact__c = NULL AND DSE__DS_Lead__c = NULL]
```

Step 3. Resetting Customer 360 Settings for Lead

If you have defined Customer 360 settings for lead, you must delete the settings and create again.

1. From the **Setup** section of the **CC360 Admin** tab, click **Run the Setup Wizard**.
2. Click **Customer 360 Settings**.
3. Click **Delete** for the Lead settings.
4. Click **New**, and configure the settings for Lead.

5. Click **Save**.

CHAPTER 3

Assigning Permissions

This chapter includes the following topics:

- Assigning Permissions Overview, 15
- Assigning Permissions to User Profiles, 15
- Assigning Permission Sets to Users, 16

Assigning Permissions Overview

User permissions and access settings specify what the users can do within an organization. After you install or upgrade CC360, assign permissions to the users through user profiles and permission sets.

CC360 contains a predefined permission set with access to the CC360 custom objects. You can assign this permission set to the intended users. The permission set extends the functional access of the users irrespective of the user profile.

Assigning Permissions to User Profiles

Use profiles to assign minimum permissions to a group of users.

1. Based on the Salesforce environment that you use, perform one of the following tasks:
   - In Salesforce Classic, perform the following tasks:
     1. In the upper-right corner of the page, select your name, and click **Setup**.
     2. Under **Administration Setup**, click **Manage Users** > **Profiles**.
   - In Lightning Experience, perform the following tasks:
     1. Click the quick access menu ( ), and then click **Setup**.
        The **Setup Home** page appears.
     2. Under **ADMINISTRATION**, click **Users** > **Profiles**.

   The **User Profiles** page appears.
2. Click a user profile to which you want to assign permissions.

   The profile details appear.
3. To edit the profile, click **Edit**.

4. Edit the permissions in the following sections:
   - Custom Object Layouts
   - Custom Field-Level Security
   - Custom App Settings
   - Custom Tab Settings
   - Enabled Apex Class Access
   - Enabled Visualforce Page Access
5. Click **Save**.

Assigning Permission Sets to Users

Use permission sets to extend the functional access of a user so that the users who belong to the same profile can have different permissions.

1. Based on the Salesforce environment that you use, perform one of the following tasks:
   - In Salesforce Classic, perform the following tasks:
     1. In the upper-right corner of the page, select your name, and click **Setup**.
     2. Under **Administration Setup**, click **Manage Users** > **Users**.
   - In Lightning Experience, perform the following tasks:
     1. Click the quick access menu (), and then click **Setup**.
        The **Setup Home** page appears.
     2. Under **ADMINISTRATION**, click **Users** > **Users**.

   The list of users appear.
2. Click a user.

   The user details appear.
3. Under **Permission Set Assignments**, click **Edit Assignments**.
4. Under **Available Permission Sets**, select **CC360 Permission Set** and click **Add**.

   The **CC360 Permission Set** is added to **Enabled Permission Sets**.
5. Click **Save**.

CHAPTER 4

Configuring Page Layout

This chapter includes the following topics:

- Configuring Page Layout Overview, 17
- Customizing the Visualforce Pages for Salesforce Objects, 18
- Configuring the Accounts Home Page, 19
- Configuring the Contacts Home Page, 24
- Configuring the Leads Home Page, 27
- Configuring Field Sets, 31
- Configuring the Customer 360 View, 36

Configuring Page Layout Overview

After you install CC360, you can configure the page layouts to provide access to CC360 features such as Duplicate Accounts, Other Duplicates, and Consolidated View. Use page layouts to configure the layout of detail and edit pages in CC360.

Configure the following page components on the account, contact, and lead details pages:

Account

Normalizes the account information to prevent record duplication.

Beans related lists

Displays the data contained in the bean columns.

Consolidated View button

Displays the consolidated data and data sources for the record in the Data Manager.

Contact

Normalizes the contact information to prevent record duplication.

Country ISO field

Normalizes the country information to prevent record duplication.

DaaS Editor

Allows you to verify the contact details, such as addresses, email addresses, and phone numbers. Available only if you configure a DaaS Editor page for the specific object.

Domain field

Normalizes the web domain address to prevent record duplication

Duplicate section

Contains the Duplicate Visualforce component.

Duplicate Visualforce component

Displays records that CC360 identifies as duplicates of the record you are viewing.

Find Duplicates button

Searches for records CC360 identifies as duplicates of the record you are viewing.

Hierarchy Information section

Contains the Hierarchy Visualforce component.

Hierarchy Visualforce component

Displays hierarchies that contain the account record you are viewing.

Legal Form field

Normalizes differences in the legal form, such as Ltd. and Limited, to prevent record duplication.

Master beans related lists

Displays the data contained in the master bean columns.

New button

Configure the New button so the button launches the CC360 Visualforce Account page. The CC360 Visualforce page prevents users from entering duplicate records and replaces the Salesforce page.

Synchronize field

You can flag an account to synchronize during batch synchronization. You can also verify that an account is synchronized.

Customizing the Visualforce Pages for Salesforce Objects

You can override the Visualforce pages through which you can create Salesforce objects. You can hide the custom buttons in the account, contact, and lead Visualforce pages.

Use the following internal settings to customize the Visualforce pages:

Roles to Hide Search on Scout Pages

You can hide the custom buttons in the CC360 account, contact, and lead Visualforce pages. To hide **Search**, **Search Option**, **Hide Required Fields**, and **Show Required Fields**, set the internal setting `Roles to Hide Search on Scout Pages` value to a user profile.

The following sample code sets the value of the internal setting to a profile:

```
API_SettingsManager.updateInternalSetting('Roles to Hide Search on Scout
Pages','Profile1');
```

Account Scout Redirect URL

You can override the account Visualforce page and redirect it to a custom account Visualforce page. To override the account Visualforce page, set the internal setting `Account Scout Redirect URL` value to the URL of a custom account Visualforce page.

Use the following sample code to set the value of the internal setting `Account Scout Redirect URL` to the URL of a custom account Visualforce page:

```
API_SettingsManager.updateInternalSetting('Account Scout Redirect URL','/apex/<URL
of the custom account Visualforce page>id=@RECORDID@');
```

For example, the following sample code sets the value of the internal setting to the URL of a custom account Visualforce page:

```
API_SettingsManager.updateInternalSetting('Account Scout Redirect URL','/apex/
MyAccountRedirectpagename?id=@RECORDID@');
```

Contact Scout Redirect URL

You can override the contact Visualforce page and redirect it to a custom contact Visualforce page. To override the contact Visualforce page, set the internal setting `Contact Scout Redirect URL` value to the URL of a custom contact Visualforce page.

Use the following sample code to set the value of the internal setting `Contact Scout Redirect URL` to the URL of a custom contact Visualforce page:

```
API_SettingsManager.updateInternalSetting('Contact Scout Redirect URL','/apex/<URL
of the custom contact Visualforce page>id=@RECORDID@');
```

For example, the following sample code sets the value of the internal setting to the URL of a custom contact Visualforce page:

```
API_SettingsManager.updateInternalSetting('Contact Scout Redirect URL','/apex/
MyContactRedirectpagename?id=@RECORDID@');
```

Lead Scout Redirect URL

You can override the lead Visualforce page and redirect it to a custom lead Visualforce page. To override the lead Visualforce page, set the internal setting `Lead Scout Redirect URL` value to the URL of a custom lead Visualforce page.

Use the following sample code to set the value of the internal setting `Lead Scout Redirect URL` to the URL of a custom lead Visualforce page:

```
API_SettingsManager.updateInternalSetting('Lead Scout Redirect URL','/apex/<URL of
the custom lead Visualforce page>id=@RECORDID@');
```

For example, the following sample code sets the value of the internal setting to the URL of a custom lead Visualforce page:

```
API_SettingsManager.updateInternalSetting('Lead Scout Redirect URL','/apex/
MyLeadRedirectpagename?id=@RECORDID@');
```

Configuring the Accounts Home Page

Configure the accounts home page to provide access to CC360 functionality, such as synchronization status, duplicate accounts, and hierarchies.

1. Override the standard Salesforce Account page.
2. Configure the account page layout.
3. If you use Lightning Experience, configure the Lightning account page to include the CC360 Lightning components.
4. Configure the account search fields.

Step 1. Overriding the Standard Salesforce Account Page

You can override the standard Salesforce Account page to access CC360 processes, such as searching for duplicates, verifying addresses, email addresses, and phone numbers, and searching for records. To override the Salesforce Account page, set the CC360 Account page to the **New** button on the Accounts Home page.

1. Based on the Salesforce environment that you use, perform one of the following tasks:
   - In Salesforce Classic, perform the following tasks:
     1. In the upper-right corner of the page, select your name, and click **Setup**.
     2. Under **App Setup**, select **Customize** > **Accounts** > **Buttons, Links, and Actions**.
        The **Buttons, Links, and Actions: Accounts** page appears.
     3. In the **Buttons, Links, and Actions** table, click **Edit** in the **New** button row.
        The **Override Standard Button or Link: New** page appears.
   - In Lightning Experience, perform the following tasks:
     1. Click the quick access menu (), and then click **Setup**.
        The **Setup Home** page appears.
     2. Under **PLATFORM TOOLS**, click **Objects and Fields** > **Object Manager**.
        The **Object Manager** page appears.
     3. Click **Accounts**.
        The **Details** page appears.
     4. Click **Buttons, Links, and Actions**.
        The **Buttons, Links, and Actions** page appears.
     5. In the **New** button row, click the downward arrow, and select **Edit**.
        The **Override Standard Button or Link: New** page appears.
2. Select **Visualforce page**, and then select **Account Scout [DS_AccountScoutPage]**.
3. Click **Save**.

Step 2. Configuring the Account Page Layout

You must configure the account page layout to provide access to the CC360 account functionality.

1. Based on the Salesforce environment that you use, perform one of the following tasks:
   - In Salesforce Classic, perform the following tasks:
     1. In the upper-right corner of the page, select your name, and click **Setup**.
     2. Under **App Setup**, select **Customize** > **Accounts** > **Page Layouts**.
        The **Account Page Layout** page appears.
     3. For **Account Layout**, click **Edit**.
        The Account enhanced page layout editor appears.
   - In Lightning Experience, perform the following tasks:
     1. Click the quick access menu (), and then click **Setup**.
        The **Setup Home** page appears.
     2. Under **PLATFORM TOOLS**, click **Objects and Fields** > **Object Manager**.
        The **Object Manager** page appears.

3. Click **Accounts**.
   The **Details** page appears.
4. Click **Page Layouts**.
   The **Accounts: Page Layouts** page appears.
5. In the **Account Layout** row, click the downward arrow, and select **Edit**.
   The **Account Layout** page appears.

2. From the **Account Layout** palette, select **Buttons** and drag the **Consolidated View** button and **Find Duplicates** button to the **Custom Buttons** area under **Account Detail**.
3. From the **Account Layout** palette, select **Fields** and drag the **Section** field from the palette to the **Account** page layout.

   The **Section Properties** window appears.
4. Configure the CC360 Information section:
   a. Enter `CC360 Information` in the **Section Name** text box.
   b. Enable **Detail Page** and **Edit Page**.
   c. Select **2-Column** layout.
   d. Select **Left-Right** tab-key order.
   e. Click **OK**.

   The CC360 Information section is added to the Account page.
5. From the **Account Layout** palette, select **Fields** and drag the following fields from the palette to the CC360 Information section:
   - Country ISO Code field
   - Legal Form field
   - Domain field
   - Synchronize field
6. From the **Account Layout** palette, select **Related Lists** and drag the **Beans** and **Master Beans** related lists from the palette to the Account page layout.
7. From the **Account Layout** palette, select **Fields** and drag the **Section** field from the palette to the **Account** page layout.

   The **Section Properties** window appears.
8. Configure the Duplicate Accounts section:
   a. Enter `Duplicate Accounts` in the **Section Name** text box.
   b. Enable **Detail Page** and **Edit Page**.
   c. Select **1-Column** layout.
   d. Select **Left-Right** tab-key order.
   e. Click **OK**.

   The Duplicate Accounts section is added to the Account page.
9. If you use Salesforce Classic, from the **Account Layout** palette, select **Visualforce Pages** and drag **Duplicate Accounts** to the **Duplicate Accounts** section.

   You can double-click the Duplicate Accounts Visualforce component to change the display properties of the component.

Note: If you use Lightning Experience, you must add the Lightning component to display the duplicate accounts. For more information about adding the Lightning components, see "Step 3. Configure the Lightning Account Page" on page 22.

10. Optionally, if you have Data as a Service (DaaS) enabled in your organization, perform the following tasks:
    a. From the **Account Layout** palette, select **Visualforce Pages**.
    b. Drag the DaaS Editor Visualforce component from the palette to the **Address Information** section.
    c. Click the **Properties** icon of the DaaS Editor Visualforce component and increase the height of the component to 300 pixels. Default is 200 pixels.
11. From the **Account Layout** palette, select **Fields** and drag the **Section** field from the palette to the **Account** page layout.

    The **Section Properties** window appears.
12. Configure the Hierarchy Information section:
    a. Enter `Hierarchy Information` in the **Section Name** text box.
    b. Enable **Detail Page** and **Edit Page**.
    c. Select **1-Column** layout.
    d. Select **Left-Right** tab-key order.
    e. Click **OK**.

    The Hierarchy Information section is added to the Account page.

    Note: If you use Lightning Experience, you can add the hierarchy component. For more information about adding the Lightning components, see "Step 3. Configure the Lightning Account Page" on page 22.
13. From the Account Layout palette, select **Visualforce Pages**.
14. If you have alternate hierarchy mode enabled, based on the Salesforce environment that you use, drag one of the following Account Hierarchy Visualforce component from the palette to the **Hierarchy Information** section:
    - **Hierarchy** Visualforce component for Salesforce Classic.
    - **Hierarchy V2** Visualforce component for Lightning Experience.

    Note: Do not add the Hierarchy Edit component to the **Hierarchy Information** section because the **Hierarchy Information** section does not support the Hierarchy Edit component.
15. To change the display properties of the component, double-click the Account Hierarchy Visualforce component.
16. From the Account Layout palette, select **Fields** and then drag the Ultimate Parent field, the Ultimate Parent Name field, and the Last Updated field from the palette to the **Hierarchy Information** section.
17. Click **Save** from the **Account Layout** palette.

Step 3. Configure the Lightning Account Page

If you use Lightning Experience, you must configure the Lightning account page to include the CC360 Lightning components.

1. Click the quick access menu ( ), and then click **Setup**.

   The **Setup Home** page appears.
2. Under **PLATFORM TOOLS**, click **Objects and Fields** > **Object Manager**.

   The **Object Manager** page appears.

3. Click **Accounts**.

   The **Details** page appears.
4. Click **Lightning Record Pages**.

   The **Lightning Record Pages** page appears.
5. Click the default accounts record page.
6. Click **Edit**.
7. In the **Lightning Components** pane, under **Custom**, drag the following components to the desired position on the canvas:
   - `DS_LT_CC360_Duplicate_Component`. Displays the duplicate records. You can merge the duplicate records.
   - `DS_LT_CC360_Hierarchy_Component`. Displays the hierarchy. You can edit the hierarchy.
8. Click **Save**.
9. If the account page layout contains the Duplicate Accounts Visualforce component, perform the following tasks:
   a. Click **Back**.
   b. Click **Page Layouts**.

      The **Accounts: Page Layouts** page appears.
   c. In the **Account Layout** row, click the downward arrow, and select **Edit**.

      The **Account Layout** page appears.
   d. Delete the **Duplicate Accounts** component from the page layout.
   e. Click **Save**.

Step 4. Configuring the Account Search Fields

To configure the account search fields that appear on the CC360 **Account** page, configure the search field set.

1. From the **Setup** section of the **CC360 Admin** tab, click **Run the Setup Wizard**.
2. Under **Setup**, click **Field Set**.

   The **Field Set Settings** page appears.
3. In the **Account Field Sets** section, click **Edit Account Field Sets**.

   The **Account Field Sets** page appears.
4. Select **Edit** for the **Account Search Fields**.
5. Drag the appropriate fields from the **Account Search Fields** palette to the field set list.
6. Click **Save**.

Configuring the Contacts Home Page

Configure the contacts home page to provide access to CC360 functionality, such as synchronization status and duplicate contacts.

1. Override the standard Salesforce Contact page.
2. Configure the contact page layout.
3. If you use Lightning Experience, configure the Lightning contact page to include the CC360 Lightning components.

Step 1. Overriding the Standard Salesforce Contact Page

You can override the standard Salesforce Contact page to access CC360 processes, such as searching for duplicates, verifying addresses, email addresses, and phone numbers, and searching for records. To override the Salesforce Contact page, set the CC360 Contact page to the **New** button on the Contacts Home page.

1. Based on the Salesforce environment that you use, perform one of the following tasks:
   - In Salesforce Classic, perform the following tasks:
     1. In the upper-right corner of the page, select your name, and click **Setup**.
     2. Under **App Setup**, select **Customize** > **Contacts** > **Buttons, Links, and Actions**.
        The **Buttons, Links, and Actions: Contacts** page appears.
     3. In the **Buttons, Links, and Actions** table, click **Edit** in the **New** button row.
        The **Override Standard Button or Link: New** page appears.
   - In Lightning Experience, perform the following tasks:
     1. Click the quick access menu (), and then click **Setup**.
        The **Setup Home** page appears.
     2. Under **PLATFORM TOOLS**, click **Objects and Fields** > **Object Manager**.
        The **Object Manager** page appears.
     3. Click **Contacts**.
        The **Details** page appears.
     4. Click **Buttons, Links, and Actions**.
        The **Buttons, Links, and Actions** page appears.
     5. In the **New** button row, click the downward arrow, and select **Edit**.
        The **Override Standard Button or Link: New** page appears.
2. Select **Visualforce page**, and then select **Contact Scout [DS_ContactScoutPage]**.
3. Click **Save**.

Step 2. Configuring the Contact Page Layout

Configure the contact page layout to provide access to CC360 contact functionality.

1. Based on the Salesforce environment that you use, perform one of the following tasks:
   - In Salesforce Classic, perform the following tasks:
     1. In the upper-right corner of the page, select your name, and click **Setup**.

2. Under **App Setup**, select **Customize** > **Contacts** > **Page Layouts**.
   The **Contact Page Layout** page appears.
3. For **Contact Layout**, click **Edit**.
   The Contact page layout editor appears.

- In Lightning Experience, perform the following tasks:

  1. Click the quick access menu (), and then click **Setup**.
     The **Setup Home** page appears.
  2. Under **PLATFORM TOOLS**, click **Objects and Fields** > **Object Manager**.
     The **Object Manager** page appears.
  3. Click **Contacts**.
     The **Details** page appears.
  4. Click **Page Layouts**.
     The **Contacts: Page Layouts** page appears.
  5. In the **Contact Layout** row, click the downward arrow, and select **Edit**.
     The **Contact Layout** page appears.

2. From the **Contact Layout** palette, select **Buttons** and drag the **Consolidated View** button and **Find Duplicates** button to the **Custom Buttons** area under **Contact Detail**.
3. From the **Contact Layout** palette, select **Fields** and drag the **Section** field from the palette to the **Contact** page layout.

   The **Section Properties** window appears.
4. Configure the CC360 Information section:

   a. Enter `CC360 Information` in the **Section Name** text box.

   b. Enable **Detail Page** and **Edit Page**.

   c. Select **2-Column** layout.

   d. Select **Left-Right** tab-key order.

   e. Click **OK**.

   The **CC360 Information**section is added to the Contact page.
5. From the **Contact Layout** palette, select **Fields** and drag the following fields from the palette to the CC360 Information section:

   - Country ISO Code field
   - Legal Form field
   - Domain field
   - Synchronize field
6. From the **Contact Layout** palette, select **Related Lists** and drag the **Beans** related list from the palette to the Contact page layout.
7. From the **Contact Layout** palette, select **Fields** and drag the **Section** field from the palette the **Contact** page layout.

   The **Section Properties** window appears.
8. Configure the Duplicate Contacts section:

   a. Enter `Duplicate Contacts` in the **Section Name** text box.

   b. Enable **Detail Page** and **Edit Page**.

c. Select **1-Column** layout.

d. Select **Left-Right** tab-key order.

e. Click **OK**.

The **Duplicate Contacts** section is added to the **Contact** page.

9. If you use Salesforce Classic, from the **Contact Layout** palette, select **Visualforce Pages** and drag **Duplicate Contacts** to the **Duplicate Contacts** section.

   You can double-click the Duplicate Contacts Visualforce component to change the display properties of the component.

   Note: If you use Lightning Experience, you must add the Lightning component to display the duplicate contacts. For more information about adding the Lightning components, see "Step 3. Configure the Lightning Contact Page" on page 26.

10. Optionally, if you have Data as a Service (DaaS) enabled in your organization, perform the following tasks:

    a. From the **Contact Layout** palette, select **Visualforce Pages**.

    b. Drag the DaaS Editor Visualforce component from the palette to the **Address Information** section.

    c. Click the **Properties** icon of the DaaS Editor Visualforce component and increase the height of the component to 300 pixels. Default is 200 pixels.

11. Click **Save** from the **Contact Layout** palette.

Step 3. Configure the Lightning Contact Page

If you use Lightning Experience, you must configure the Lightning contact page to include the CC360 Lightning components.

1. Click the quick access menu ( ), and then click **Setup**.

   The **Setup Home** page appears.

2. Under **PLATFORM TOOLS**, click **Objects and Fields** > **Object Manager**.

   The **Object Manager** page appears.

3. Click **Contacts**.

   The **Details** page appears.

4. Click **Lightning Record Pages**.

   The **Lightning Record Pages** page appears.

5. Click the default contacts record page.

6. Click **Edit**.

7. In the **Lightning Components** pane, under **Custom**, drag **DS_LT_CC360_Duplicate_Component** to desired position on the canvas.

   Use the `DS_LT_CC360_Duplicate_Component` component to display and merge the duplicate records.

8. Click **Save**.

9. If the contact page layout contains the Duplicate Contacts Visualforce component, perform the following tasks:

   a. Click **Back**.

   b. Click **Page Layouts**.

      The **Contacts: Page Layouts** page appears.

c. In the **Contact Layout** row, click the downward arrow, and select **Edit**.

   The **Contact Layout** page appears.

d. Delete the **Duplicate Contacts** component from the page layout.

e. Click **Save**.

Configuring the Leads Home Page

Configure the lead home page to provide access to CC360 functionality, such as synchronization status and duplicate leads.

1. Override the standard Salesforce Lead page.
2. Configure the lead page layout.
3. If you use Lightning Experience, configure the Lightning lead page to include the CC360 Lightning components.
4. Optionally, restrict converted statuses.

Step 1. Overriding the Standard Salesforce Lead Page

You can override the standard Salesforce Lead page to access CC360 processes, such as searching for duplicates, verifying addresses, email addresses, and phone numbers, and searching for records. To override the Salesforce Lead page, set the CC360 Lead page to the **New** button on the Leads Home page.

1. Based on the Salesforce environment that you use, perform one of the following tasks:
   - In Salesforce Classic, perform the following tasks:
     1. In the upper-right corner of the page, select your name, and click **Setup**.
     2. Under **App Setup**, select **Customize** > **Leads** > **Buttons, Links, and Actions**.
        The **Buttons, Links, and Actions: Leads** page appears.
     3. In the **Buttons, Links, and Actions** table, click **Edit** in the **New** button row.
        The **Override Standard Button or Link: New** page appears.
   - In Lightning Experience, perform the following tasks:
     1. Click the quick access menu (), and then click **Setup**.
        The **Setup Home** page appears.
     2. Under **PLATFORM TOOLS**, click **Objects and Fields** > **Object Manager**.
        The **Object Manager** page appears.
     3. Click **Leads**.
        The **Details** page appears.
     4. Click **Buttons, Links, and Actions**.
        The **Buttons, Links, and Actions** page appears.
     5. In the **New** button row, click the downward arrow, and select **Edit**.
        The **Override Standard Button or Link: New** page appears.
2. Select **Visualforce page**, and then select **Lead Scout [DS_LeadScoutPage]**.
3. Click **Save**.

Step 2. Configuring the Lead Page Layout

Configure the lead page layout to provide access to CC360 lead functionality.

1. Based on the Salesforce environment that you use, perform one of the following tasks:
   - In Salesforce Classic, perform the following tasks:
     1. In the upper-right corner of the page, select your name, and click **Setup**.
     2. Under **App Setup**, select **Customize** > **Leads** > **Page Layouts**.
        The **Lead Page Layout** page appears.
     3. For **Lead Layout**, click **Edit**.
        The Contact page layout editor appears.
   - In Lightning Experience, perform the following tasks:
     1. Click the quick access menu (), and then click **Setup**.
        The **Setup Home** page appears.
     2. Under **PLATFORM TOOLS**, click **Objects and Fields** > **Object Manager**.
        The **Object Manager** page appears.
     3. Click **Leads**.
        The **Details** page appears.
     4. Click **Page Layouts**.
        The **Leads: Page Layouts** page appears.
     5. In the **Lead Layout** row, click the downward arrow, and select **Edit**.
        The **Lead Layout** page appears.
2. From the **Lead Layout** palette, select **Buttons** and drag the **Consolidated View** button and **Convert** button to the **Custom Buttons** area under **Lead Detail**.
3. From the **Standard Buttons** area under **Lead Detail**, drag the default Salesforce **Convert** button to the **Lead Layout** palette.

   Salesforce **Convert** button is removed from the Lead page layout.
4. From the **Lead Layout** palette, select **Fields** and drag the **Section** field from the palette to the **Lead** page layout.

   The **Section Properties** window appears.
5. Configure the CC360 Information section:
   a. Enter `CC360 Information` in the **Section Name** text box.
   b. Enable **Detail Page** and **Edit Page**.
   c. Select **2-Column** layout.
   d. Select **Left-Right** tab-key order.
   e. Click **OK**.

   The **CC360 Information** section is added to the Lead page.
6. From the **Lead Layout** palette, select **Fields** and drag the following fields from the palette to the **CC360 Information** section:
   - Account field
   - Contact field
   - Country ISO Code field

- Legal Form field
- Domain field
- CC360 Process field
- Synchronize field

7. From the **Lead Layout** palette, select **Related Lists** and drag the **Beans** related list from the palette to the Lead page layout.
8. From the **Lead Layout** palette, select **Fields** and drag the **Section** field from the palette to the **Lead** page layout.

   The **Section Properties** window appears.
9. Configure the Duplicate Leads section:

   a. Enter `Duplicate Leads` in the **Section Name** text box.

   b. Enable **Detail Page** and **Edit Page**.

   c. Select **1-Column** layout.

   d. Select **Left-Right** tab-key order.

   e. Click **OK**.

   The **Duplicate Leads** section is added to the **Lead** page.
10. If you use Salesforce Classic, from the **Lead Layout** palette, select **Visualforce Pages** and drag **Duplicate Leads** to the **Duplicate Leads** section.

    You can double-click the Duplicate Leads Visualforce component to change the display properties of the component.

    Note: If you use Lightning Experience, you must add the Lightning component to display the duplicate leads. For more information about adding the Lightning components, see "Step 3. Configure the Lightning Lead Page" on page 29.
11. Optionally, if you have Data as a Service (DaaS) enabled in your organization, perform the following tasks:

    a. From the **Lead Layout** palette, select **Visualforce Pages**.

    b. Drag the DaaS Editor Visualforce component from the palette to the **Address Information** section.

    c. Click the **Properties** icon of the DaaS Editor Visualforce component and increase the height of the component to 300 pixels. Default is 200 pixels.
12. Click **Save** from the **Lead Layout** palette.

Step 3. Configure the Lightning Lead Page

If you use Lightning Experience, configure the Lightning lead page to include the CC360 Lightning components.

1. Click the quick access menu (), and then click **Setup**.

   The **Setup Home** page appears.
2. Under **PLATFORM TOOLS**, click **Objects and Fields** > **Object Manager**.

   The **Object Manager** page appears.
3. Click **Leads**.

   The **Details** page appears.
4. Click **Lightning Record Pages**.

The **Lightning Record Pages** page appears.

5. Click the default leads record page.
6. Click **Edit**.
7. In the **Lightning Components** pane, under **Custom**, drag **DS_LT_DuplicateComponent** to desired position on the canvas.

   Use the `DS_LT_CC360_Duplicate_Component` component to display and merge the duplicate records.
8. Click **Save**.
9. If the lead page layout contains the Duplicate Leads Visualforce component, perform the following tasks:
   a. Click **Back**.
   b. Click **Page Layouts**.

      The **Leads: Page Layouts** page appears.
   c. In the **Lead Layout** row, click the downward arrow, and select **Edit**.

      The **Lead Layout** page appears.
   d. Delete the **Duplicate Leads** component from the page layout.
   e. Click **Save**.

Step 4. Restricting Converted Statuses (Optional)

To restrict the converted statuses that are available for a particular lead type when you convert a lead, configure a Visualforce page field in the custom settings.

1. Based on the Salesforce environment that you use, perform one of the following tasks:
   - In Salesforce Classic, perform the following tasks:
     1. In the upper-right corner of the page, select your name, and click **Setup**.
     2. Under **App Setup**, select **Develop** > **Custom Settings**.
        The **Custom Settings** page appears.
   - In Lightning Experience, perform the following tasks:
     1. Click the quick access menu (), and then click **Setup**.
        The **Setup Home** page appears.
     2. Under **PLATFORM TOOLS**, click **Custom Code** > **Custom Settings**.
        The **Custom Settings** page appears.
2. Click **Manage** for Visualforce Page Fields.

   The **Custom Setting: Visualforce Page Fields** page appears.
3. Click **New**.

   The **Visualforce Page Fields Edit** page appears.
4. In the **Name** field, enter `BusinessProcess:<Name_of_Lead_Process>` where `<Name_of_Lead_Process>` is the exact name of the lead process.
5. In the fields of **Page Fields 1** to **Page Fields 5**, enter the exact names of the converted statuses that you want to make available when a user converts a lead.

   You can enter more than one converted status in a particular **Page Field** by separating the converted status names by a comma. The converted status names cannot contain a comma.
6. Click **Save**.

Configuring Field Sets

You canspecify the fields that you want to appear on the pages and in the sections of the CC360 user interface.

You can select the default configuration, edit the default configuration, or override a field set configuration with another field set configuration.

You can configure the following field sets:

- Account field sets
- Bean field sets
- Contact field sets
- Lead field sets
- Master bean field sets
- Opportunity field sets

Account Field Sets

The account fields sets represent the fields that are related to the account object.

You can configure the following account field sets:

Account Detail Fields

Account fields in the **Account Details** section.

Person Account Search Fields

Person account fields on the person account **Search Criteria** page.

Hierarchy Edit Search Fields

Fields on the **Search Criteria** page when you search for records to add to a hierarchy.

Lead Convert Fields

Account fields on the **Convert Lead** page.

Account Search Fields

Account fields on the account **Search Criteria** page.

Account List Fields

Account fields in the list of accounts.

Account Address Fields

Address fields on the **Consolidated Information** page.

Duplicate Account List Fields

Fields in the list of duplicate accounts.

Account Merge Fields

Winning account fields that the merge batch job replaces with values from the losing account record if the field in the winning account record is null.

Hierarchy Popover Fields

Account fields to see when you hover over a node in a hierarchy.

Bean Field Sets

The bean field sets represent the fields that are related to the CC360 beans.

You can configure the following bean field sets:

Lead Search Results Fields

Fields in the list of lead search results.

Bean Detail Fields

Fields in the **Bean Detail** section.

Contact Search Results Fields

Fields in the list of contact search results.

Account Search Results Fields

Fields in the list of account search results.

Hierarchy Edit Search Results Fields

Bean fields in the search results list when you search for records to add to a hierarchy.

Bean List Fields

Bean fields in the list of beans.

Company Search Results Fields

Fields in the list of company search results.

Company Hierarchy Fields

Fields that appear in the node label in the account hierarchy.

Hierarchy Popover Fields

Bean fields to see when you hover over a node in a hierarchy.

Contact Field Sets

The contact field sets represent the fields that are related to the contact object.

You can configure the following contact field sets:

Contact Merge Fields

Winning contact fields that the merge batch job replaces with values from the losing contact record if the field in the winning contact record is null.

Lead Convert Fields

Contact fields on the **Convert Lead** page.

Contact List Fields

Contact fields in the list of contacts.

Contact Address Fields

Contact fields on the **Consolidated Information** page.

Contact Search Fields

Contact fields on the contact **Search Criteria** page.

Duplicate Contact List Fields

Fields in the list of duplicate contacts.

Lead Field Sets

The lead field sets represent the fields that are related to the lead object.

You can configure the following lead field sets:

Lead Address Fields

Lead fields on the **Consolidated Information** page.

Lead Search Fields

Lead fields on the lead **Search Criteria** page.

Lead Convert Fields

Lead fields on the **Convert Lead** page.

Lead Merge Fields

Winning lead fields that the merge batch job replaces with values from the losing lead record if the field in the winning lead record is null.

Lead List Fields

Lead fields in list of leads.

Duplicate Lead List Fields

Lead fields in the list of duplicate leads.

Master Bean Field Sets

The master bean field sets represent the fields that are related to the CC360 master beans.

You can configure the following master bean field sets:

Master Bean List Fields

Fields displayed in the list of master beans.

Master Bean Detail Fields

Fields in the **Master Bean Detail** section.

Opportunity Field Set

The opportunity field set represents the fields that are related to the opportunity object. You can configure the Opportunity List Fields field set for the opportunity object.

Configuring Field Sets for Standard Objects

To configure field sets, use the field set setup tool in the Setup Wizard.

1. From the **Setup** section of the **CC360 Admin** tab, click **Run the Setup Wizard**.
2. Under **Setup**, click **Field Set**.
3. Click **Edit Lead Field Sets**, **Edit Opportunity Field Sets**, **Edit Account Field Sets**, **Edit Contact Field Sets**, **Edit Bean Field Sets**, or **Edit Master Bean Field Sets** to edit the field set group you want to edit.
4. Click **Edit** in the **Action** column of the field set you want to edit.
5. Drag the field you want to include in the field set from the **Field Set Properties** section to the **In the Field Set** section.
6. Click **Save**.
7. To revert to the default configuration, remove all the fields from the **In the Field Set** section.

Configuring Field Sets for Custom Objects

If you have custom objects in your organization, you must configure the following field sets for the custom objects:

- Search field set. Field set that you want to use in the Lightning Scout page.
- Search result field set. Field set that the search results use in the Lightning Scout page.

  Note: Search result field set for all objects are created in the bean object.

Configuring Search Field Set

The search field set for custom object is used in the Lightning Scout page to search for custom object records. You can configure the search field set in Salesforce Classic.

1. Based on the Salesforce environment that you use, perform one of the following tasks:
   - In Salesforce Classic, perform the following tasks:
     1. In the upper-right corner of the page, select your name, and click **Setup**.
     2. Under **App Setup**, select **Create** > **Objects**.
        The **Custom Objects** page appears.
     3. Select the object for which you want to create the search field set.

        The custom object details page appears.
     4. In the **Field Sets** section, click **New**.

        The **New Field Set** page appears.
   - In Lightning Experience, perform the following tasks:
     1. Click the quick access menu ( ), and then click **Setup**.
        The **Setup Home** page appears.
     2. Under **PLATFORM TOOLS**, click **Objects and Fields** > **Object Manager**.
        The **Object Manager** page appears.
     3. Select the object for which you want to create the search field set.

        The **Details** page appears.
     4. Click **Field Sets**.

        The **Field Sets** page appears.
     5. Click **New**.

        The **New Field Set** page appears.
2. In the **Field Set Information** section, perform the following tasks:
   a. Enter a label for the field set.
   b. Enter `DS_ScoutSearchFields` as the name for the field set.
   c. Enter a short description of the field set.
3. Click **Save**.

   The field set editor page appears.
4. Drag the fields that you want to add from the custom object palette to the **In the Field Set** container.

   Note: You must add at least one field to the search field set.
5. Click **Save**.

Configuring Search Result Field Set

The result field set is used in the Lightning Scout page to display the search results of custom object records. You can configure the search result field set in Salesforce Classic.

1. Based on the Salesforce environment that you use, perform one of the following tasks:
   - In Salesforce Classic, perform the following tasks:
     1. In the upper-right corner of the page, select your name, and click **Setup**.
     2. Under **App Setup**, select **Create** > **Objects**.
        The **Custom Objects** page appears.
     3. Click **Bean**.

        The bean details page appears.
     4. In the **Field Sets** section, click **New**.

        The **New Field Set** page appears.
   - In Lightning Experience, perform the following tasks:
     1. Click the quick access menu (), and then click **Setup**.
        The **Setup Home** page appears.
     2. Under **PLATFORM TOOLS**, click **Objects and Fields** > **Object Manager**.
        The **Object Manager** page appears.
     3. Click **Bean**.

        The **Bean: Details** page appears.
     4. Click **Field Sets**.

        The **Bean: Field Sets** page appears.
     5. Click **New**.

        The **New Field Set** page appears.
2. In the **Field Set Information** section, perform the following tasks:
   a. Enter a label for the field set.
   b. Enter `ScoutSearchResultsFields_<CustomObjectKeyPrefix>` as the name for the field set.

      `CustomObjectKeyPrefix` indicates the key prefix of the custom object for which you want to create the search result field set.

      For example, if case is the custom object, enter `ScoutSearchResultsFields_500` as the label for the field set where `500` is the key prefix for case.
   c. Enter a short description of the field set.
3. Click **Save**.

   The field set editor page appears.
4. Drag the fields that you want to add from the custom object palette to the **In the Field Set** container.
5. Click **Save**.

Overriding a Field Set

You can override a field set configuration with another field set configuration. The field set configuration that you used to override can be the default configuration, a user-configured configuration, or an overridden configuration.

For example, if you override the Lead Address Fields field set with the Lead Convert Fields field set, the Lead Address Fields field set contains the fields of the Lead Convert Fields field set. If you override the Lead Convert Fields field set with the Lead List Fields field set, the Lead Address Fields field set contains the fields of the Lead List Fields field set.

Note: If you override the search field set of a standard or custom Salesforce object with a custom field set and you have record type enabled for you organization, do not add the Record Type field to the search field set as the object search field sets have the record type field configured.

1. From the **Setup** section of the **CC360 Admin** tab, click **Run the Setup Wizard**.
2. Under **Setup**, click **Field Set**.
3. Click the **Override** icon of the field set that you want to override.
4. Select a field set from the list.
5. Click **Save**.

   The field set that you override contains the fields of the selected field set.

   The **Override** icon of the field set changes to the **Revert** icon.
6. To revert to the original configuration of the field set, click the **Revert** icon of the field set.

Configuring the Customer 360 View

You can configure the objects that you can use in the **Customer 360** page.

You can also add standard objects and custom objects. Default object in Customer 360 is Contacts. You can set the default object by changing the display order.

Changing the Display Order of Objects

You can change the display order of the objects that you view in the Customer 360 page. The object that you move to the top functions as the default object. The Customer 360 page displays the records based on the selected object.

To change the display order of the objects, perform the following tasks:

1. From the **Setup** section of the **CC360 Admin** tab, click **Run the Setup Wizard**.
2. Click **Customer 360 Settings**.

   The **Customer 360 Settings** page appears.
3. Click **Change Display Order**.
4. Click the up or down arrow to move the objects.

   The object that you move to the top functions as the default object.
5. Click **Save**.

Configuring the Customer 360 View

Use the setup wizard to configure the Customer 360. You can configure the objects that you can use in the **Customer 360** page. You can add standard objects and custom objects. Default object in Customer 360 is Contacts. You can set the default object by changing the display order.

1. From the **Setup** section of the **CC360 Admin** tab, click **Run the Setup Wizard**.
2. Click **Customer 360 Settings**.
3. In the **Related Object Setup** section, perform one of the following tasks:
   - Click **New** to add an object.
   - Click **Edit Contact**, **Edit Lead**, or **Edit Opportunity** to edit the configuration.

   The **Customer 360 Settings** page appears.
4. Configure the following components:

   Object Information

   Indicates the object that you want to add or configure. The Account Lookup field selects an account relationship field associated with the selected object.

   View Filter Information

   Indicates a filter logic in the filter criteria.

   For example, `MailingCountry='United States'` is a filter logic that searches for records with United States as MailingCountry.

   You can validate the filter logic. To validate the filter logic, click **Validate**.

   Display Column Information

   Indicates the fields that you can view in the Customer 360 page. You can use the predefined field sets or you can select the fields that you want to view in the Customer 360 page.

   Display Record Information

   Indicates the number of records that you want to display on the Customer 360 page.

   Visibility Information

   Indicates the custom permission that you want to assign to the object. You can create custom permissions and assign it to a user or to a profile. A user can view the object only if the user has the permission to access the object.
5. Click **Save**.

APPENDIX A

Glossary

alternate hierarchy

Alternate hierarchy contains a list of nodes. These nodes link to the same master bean, nodes that have the same data source, and nodes that belong to the same hierarchy type.

automerge

Process that merges data.

bean

An object that holds data. CC360 creates a bean for every source record.

best version of the truth

The record maintained by the master bean that consists of the best data from the source records.

company norm

The company name without the legal form.

consolidation

The process of consolidating data from multiple source systems.

country name normalization

The process of standardizing the data in the country name field.

DaaS

Data as a Service (DaaS) contains address verification, phone number verification, and email address verification services. DaaS can be integrated with Cloud MDM - Customer 360 for Salesforce to verify addresses, email addresses, and phone numbers.

DaaS job

Verifies addresses, email addresses, and phone numbers of the Salesforce records.

data conversion

The process of converting beans from external data sources to Salesforce records.

de-duplication

Process of removing duplicate records.

duplicate check

A job that identifies duplicate records.

enrichment

The process of enhancing Salesforce records with consolidated data from the master beans after you run the consolidation batch job.

fuzzy matching

A probabilistic matching approach.

legal form

The business entity designation or frequently occurring element in a company name.

legal form normalization

The process of extracting the legal form from the company norm and populating the legal form field with normalized data.

master bean

Master beans link the related contact beans and lead beans to the account and also maintain the best version of the truth. CC360 creates a master bean for every account bean.

Master Org

Master Org is the central org on which you install Cloud MDM - Customer 360 for Salesforce.

multidimensional hierarchies

Contains records that are present in more than one hierarchy.

Multi-Org

Multi-Org capability automates the cleansing, standardization, de-duplication, and master data management of data from multiple Orgs in a distributed Salesforce environment.

object

A table similar to a database table that stores information.

organization

A deployment of Salesforce with a defined set of licensed users that is similar to the operational reference store of the MDM Multidomain Edition. An organization is the virtual space salesforce.com provides to an individual customer. Your organization includes all of your data and applications.

package

A group of Force.com components and apps that are made available through the AppExchange.

profile

Contains a set of permissions to perform tasks in the Cloud MDM - Customer 360 for Salesforce environment.

Spoke Org

Spoke Org connects to the Master Org to get updated accounts and person accounts.

standardization

Standardizes data that is used inconsistently, such as country names.

state and country picklists

State and country picklists are predefined and standardized states and countries. If you enable state and country picklist, you can select states and countries instead of entering state and country data into text fields.

synchronization

The process of migrating Salesforce data into Cloud MDM - Customer 360 for Salesforce.

ultimate parent

The root node of the hierarchy. The ultimate parent is the topmost node in the hierarchy.

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