

Salesforce The Legacy Bigtincan Content App

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*Note:

1. This support article refers to a legacy version of the Bigtincan Salesforce app. This version is no longer available for download.
2. A new version can be downloaded from Salesforce App Exchange at <https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3u00000PFVBcEAP>

Salesforce The Legacy Bigtincan Content App

Bigtincan provides seamless integration between Salesforce (SF) and Bigtincan Hub. The integration also comes with a powerful Content Recommendation feature that enables Salesforce users to make use of related content in Bigtincan hub.

This guide provides an overview to enable installation and configuration of the Bigtincan Content Recommendation plugin. This includes steps required in both Bigtincan Hub and client specific Salesforce instance.

Requirements

Assumptions

Below are assumptions made prior to following the steps in this manual.

The Bigtincan Content Recommendation plugin for Salesforce requires Salesforce API access and so one of the following Salesforce editions are required:

- Enterprise Edition
- Unlimited Edition
- Developer Edition
- Performance Edition

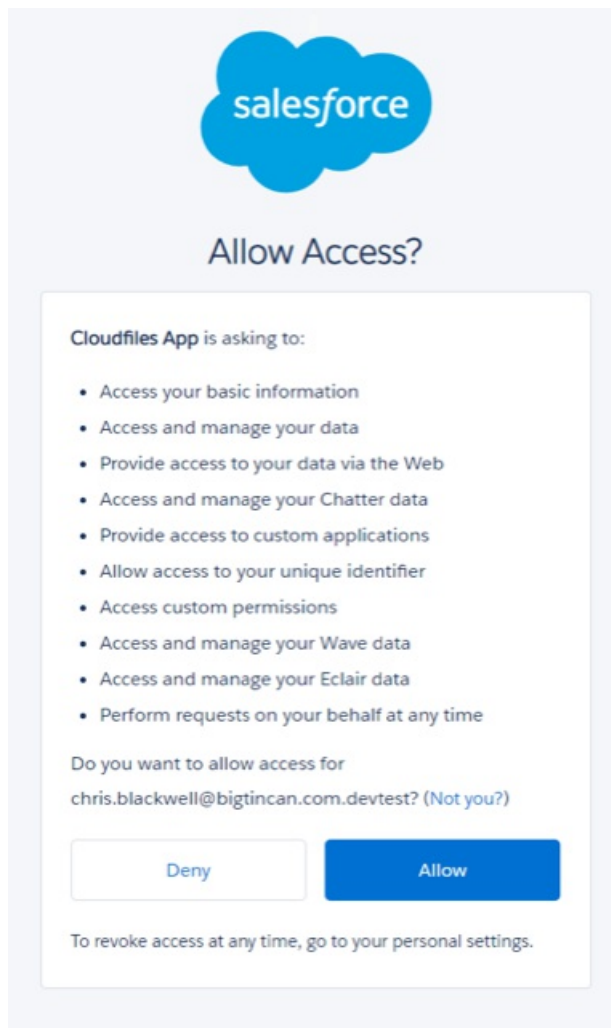
An active Bigtincan Hub tenant exists and is enabled to work with SF (i.e. <https://app.bigtincan.com>)
Client Salesforce instance up and running (i.e. <https://company.my.salesforce.com>)
Outreach to customersuccess@bigtincan.com requesting licenses for plugin.

Also an administrator of the Company's Salesforce instance should execute the installation of the package and steps required in this manual.

Please note that if the Salesforce instance is a Sandbox please send a request to support@bigtincan.com asking for Salesforce Sandbox support.

Allow Access

The Hub requires certain permissions for the integration process. Users must ensure they've allowed the following permissions for properly integration:

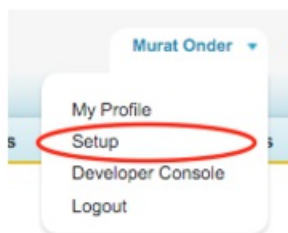


Click "Allow" to save the granted permissions and progress to the next step of integration.

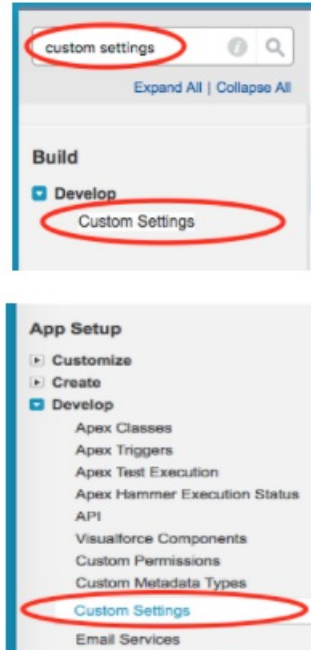
Post Installation Instructions

After the installation, please follow the steps below to start using the plugin.

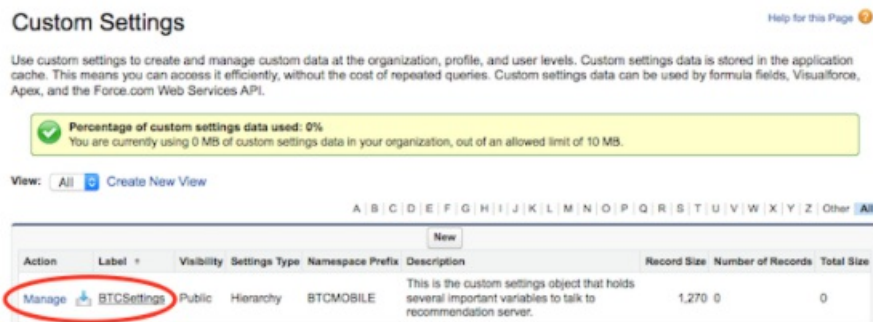
- 1 Navigate to "Setup".



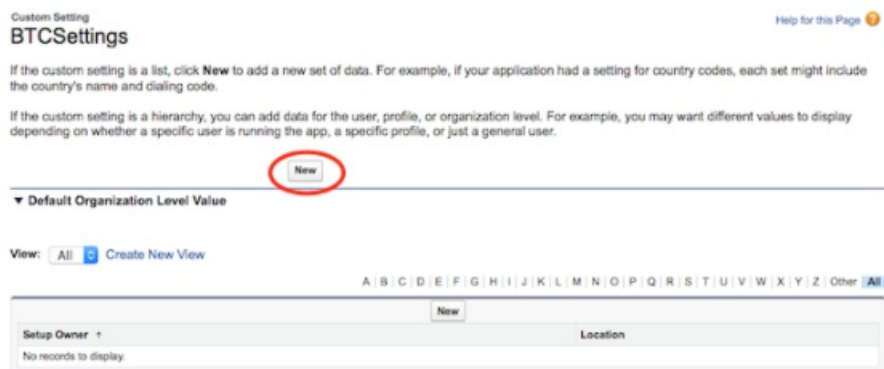
2 Navigate to Setup-> App Setup-> Develop-> Custom Settings or use quick access menu and search for "Custom Settings". Click "Custom Settings" to go to the page.



3 On the Custom Settings page, find the object called "BTCSettings" and click "Manage".

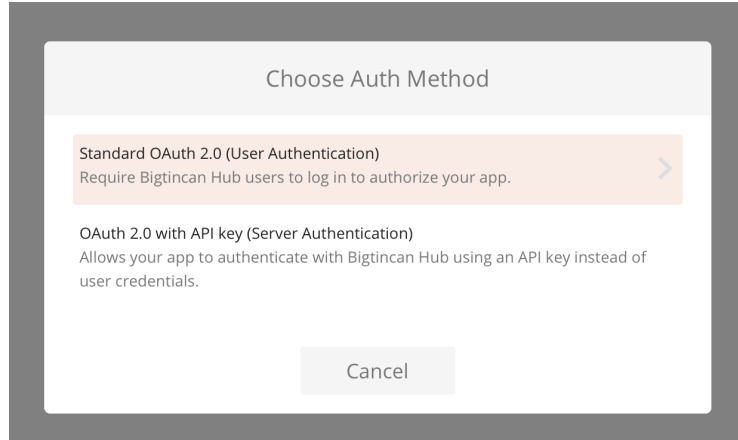


4 On the BTCSettings detail page, either click on "New" (or "Edit" if it already exists) and copy the URI from the custom BTCSettings.



5 From the Bigtincan web app, navigate to Platform Configuration> Custom Apps and select the

"Standard OAuth 2.0 (User Authentication)" option.



6 Fill out the Application Name field with a descriptive name (e.g., "Salesforce"), add the URL for your Salesforce instance in the OAuth 2.0 URI field and select all of the Application Scope check boxes. Copy and save the Client ID and Client Secret value for use in the next step.

Application Name

Salesforce v2
(application name cannot be empty)

OAuth 2.0 redirect URI

The redirect URI is the URL in your application that will receive OAuth 2.0 callbacks.

https://na85.salesforce.com/apex/BTCMOBILE_BTCAuth
(https://www.sample.com)

Application Scopes

Select the scopes shown on the OAuth consent screen when users authorize your app.
(scopes cannot be empty)

<input checked="" type="checkbox"/> Create/edit user groups	<input checked="" type="checkbox"/> Read form data
<input checked="" type="checkbox"/> Create/edit users	<input checked="" type="checkbox"/> Read story data
<input checked="" type="checkbox"/> Modify channels	<input checked="" type="checkbox"/> Read tab data
<input checked="" type="checkbox"/> Modify content structure	<input checked="" type="checkbox"/> Read user data
<input checked="" type="checkbox"/> Modify stories	<input checked="" type="checkbox"/> Read user group data
<input checked="" type="checkbox"/> Modify tabs	<input checked="" type="checkbox"/> Read user profile data
<input checked="" type="checkbox"/> Modify user profile data	<input checked="" type="checkbox"/> Read user settings
<input checked="" type="checkbox"/> Read channel data	<input checked="" type="checkbox"/> Track story and file interactions

OAuth 2.0 credentials

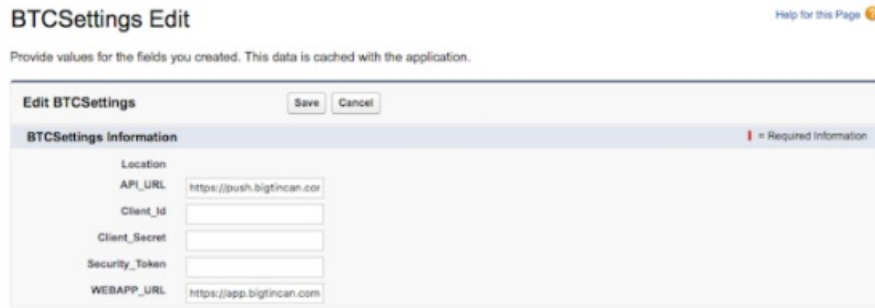
Client ID

358333fab01f1ba1a29b5ba7f4efd3c0 Copy

Client Secret

..... Copy

7 Return to Salesforce and fill out the BTCSettings form with values from Step 6 and click "Save" (note that the "Security_Token" field is left blank intentionally and that the redirect URI is case-sensitive).



8 Update Remote Site Settings in Salesforce.

Update remote site settings to include the prefix set in Platform configuration>Security>DNS

- Enter Setup in [Salesforce.com](https://www.salesforce.com)

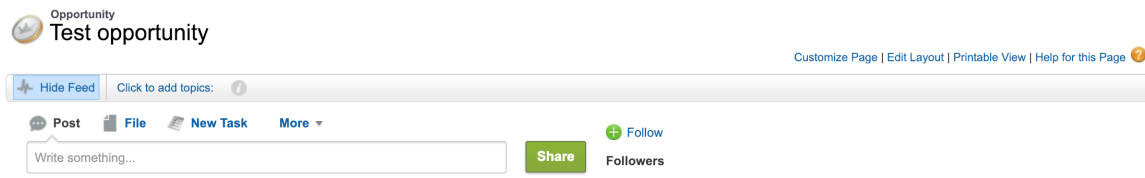
- Security Controls>Remote site settings

- Edit Remote Site URL to include the DNS alias for both bigtincan_pub_API_US and bigtincan_API_US or the appropriate region specific entries.

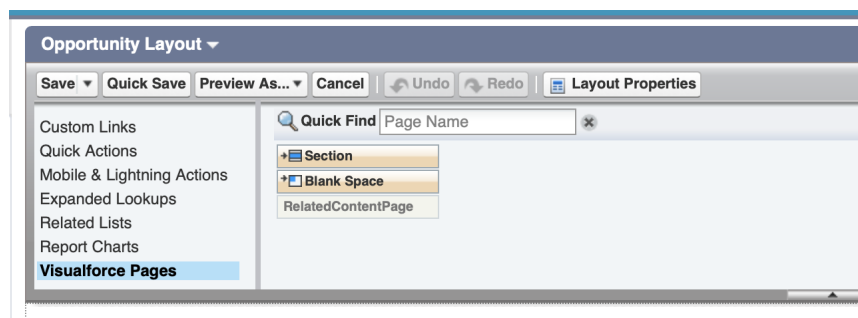
<https://.push.bigtincan.com>

<https://.pubapi.bigtincan.com>

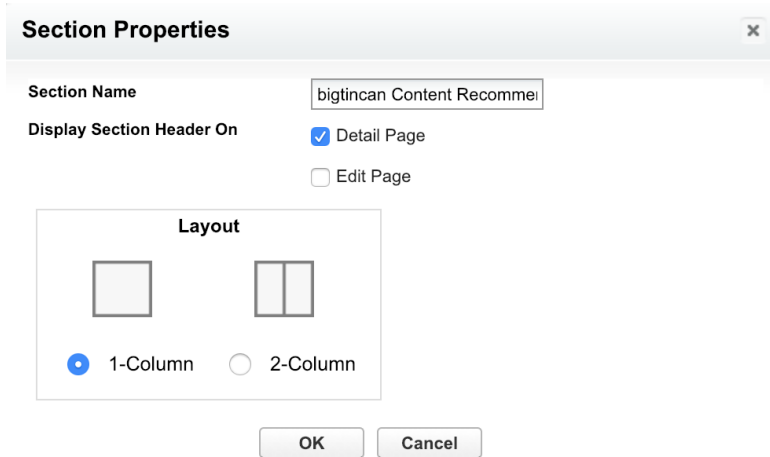
9 Go to an Opportunity page and click the “Edit Layout” link on the page.



10 On Opportunity Layout page scroll down to “Visualforce Pages” and select “Section” on the right hand side, then drag it to a location on the page that you want to display. This will be the container for the Content Recommendation plugin.



- 11 Once you let go of the “Section” widget, you will see the details window (below), enter Section Name as “Bigtincan Content Recommendation,” select “1-Column” option and de-select “Edit Page” option. Click OK.



Section Properties

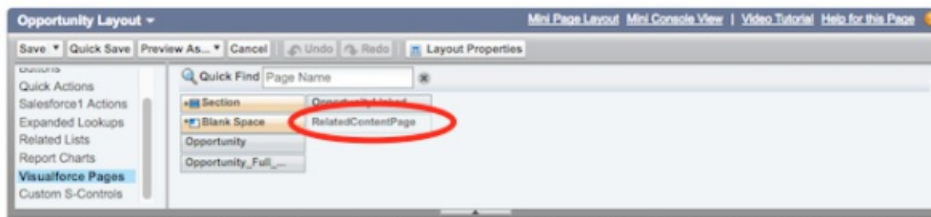
Section Name: bigtincan Content Recomme

Display Section Header On: Detail Page Edit Page

Layout: 1-Column 2-Column

OK Cancel

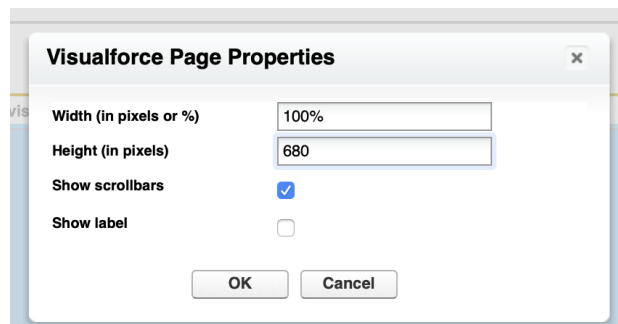
- 12 In the Opportunity Layout window, select “RelatedContentPage,” drag and drop into the section you have just created.



- 13 After drag & drop, you will see that the widget lies in that section. Please click the toolbox icon on the right hand side. It will be visible when you move the mouse to that point.



- 14 In Visualforce Page Properties window, modify the height as “680” and select “Show scrollbars” option. Click OK.



Visualforce Page Properties

Width (in pixels or %): 100%

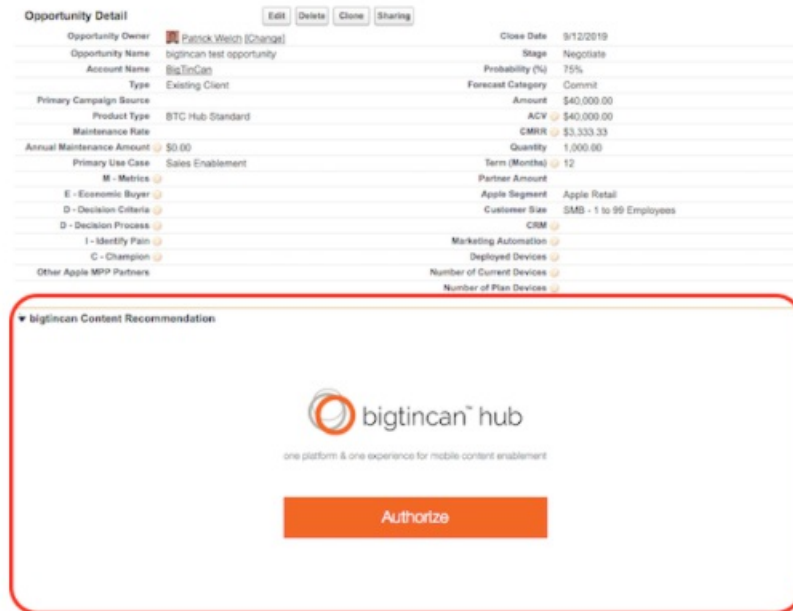
Height (in pixels): 680

Show scrollbars:

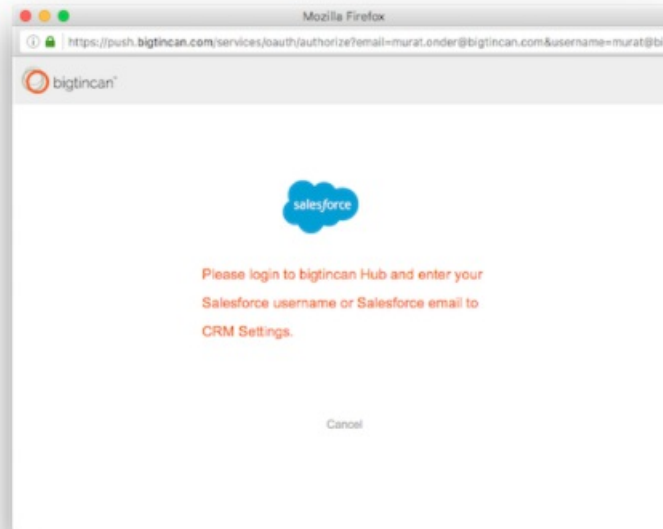
Show label:

OK Cancel

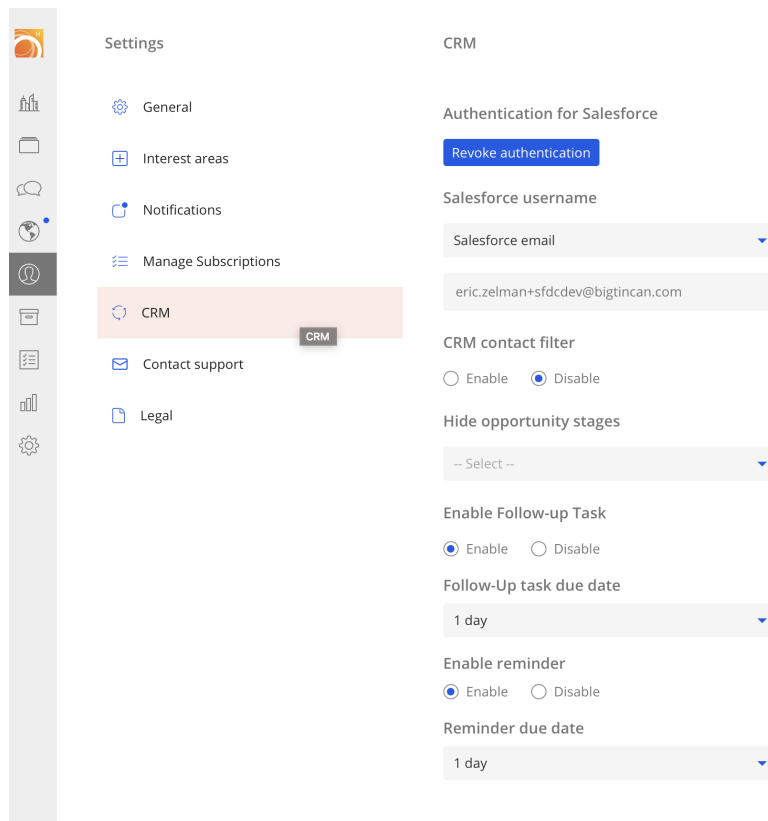
- 15 Click Save page layout and you should see the plugin page similar to below;



- 16 Note that If your company does not make end users' Salesforce email the same as your Bigtincan Hub user email, you will get a warning window similar to below;



- 17 Please have the users go to Me> Settings> General> CRM and save either your "Salesforce Username" or "Salesforce Email" so that authentication and authorization will work smoothly.



***Note:**

1. If your Bigtincan Hub instance has a different or customized URL other than <https://app.bigtincan.com>, please follow the steps 4 through 7 and modify the WEBAPP_URL field with your company's WebApp URL.
2. If you are in a different region than the United States (the default region), you should also modify API_URL by following the same steps 4 through 7. Please check the table below;

Region – API URL Table

Region	API URL
Americas	https://push.bigtincan.com
Europe	https://push.bigtincan.co.uk
Asia/Pacific	http://push.bigtincan.com.au

Addendum: Enabling SSO for the Content Recommendation package

1. Update BTCsettings to include the prefix set in Platform configuration>Security>DNS

Enter Setup in Salesforce.com

Develop>Custom Settings> BTCSettings

Manage> Edit

Update API_URL and WEBAPP_URL to include the Company Identifier DNS defined in Platform Configuration Security DNS.

API_URL: https://.push.bigtincan.com

WEBAPP_URL: https://.appnext.bigtincan.com

2. Update remote site settings to include the prefix set in Platform Configuration> Security>DNS

Enter Setup in Salesforce.com

Security Controls>Remote site settings> Bigtincan remote site settings (BTCMOBILE)

Edit Remote Site URL to include the DNS alias for both bigtincan_pub_API_US and bigtincan_API_US or the appropriate region specific entries.

https://.push.bigtincan.com

https://.pubapi.bigtincan.com

Summary

The Bigtincan Hub & Salesforce integration has been designed with security in mind, offering a convenient, easy and seamless type of integration to your favorite CRM. Above explained steps can be achieved easily without hassle. Please contact Bigtincan Support in case you have problems, Bigtincan is ready to help you 24/7.
