

# Fall 17 Upgrade Instructions (From Spring 17)

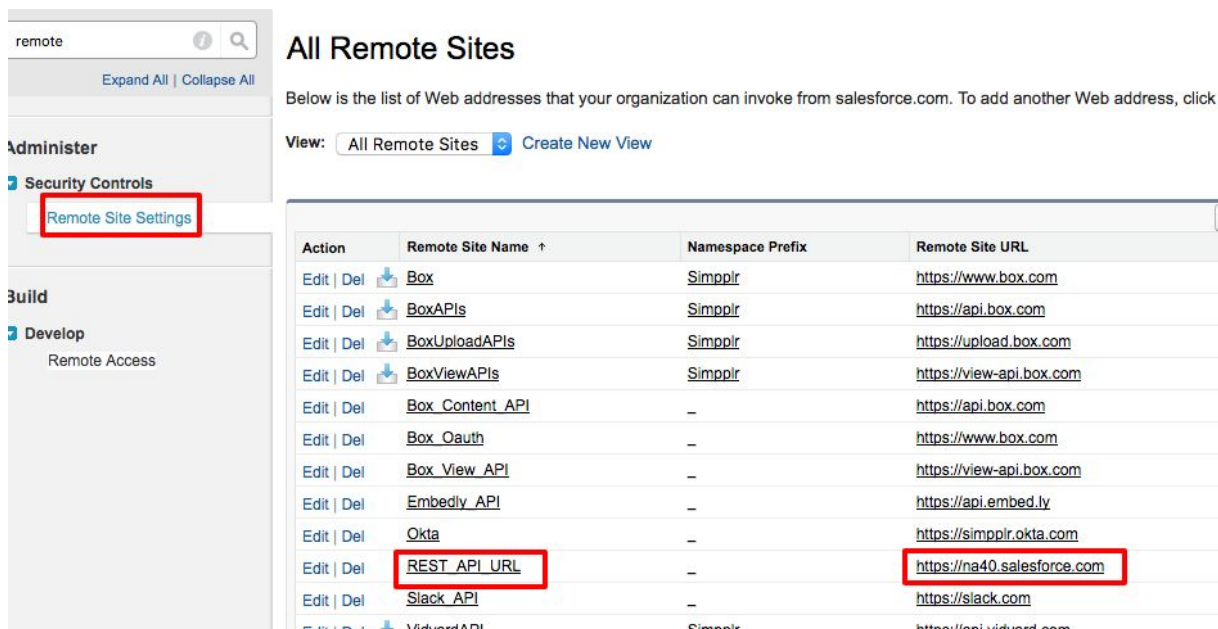
Please upgrade Simpplr during off business hours. There will be some down time users cannot access Simpplr during the upgrade process.

Please also go through the following instructions from **Salesforce Classic**.

## Pre-installation check (Sandbox only):

Go to Salesforce Setup, search for “Remote Site Settings”.

Please double check the “REST API URL” is pointing to the sandbox server. If you just refreshed the sandbox, the Remote Site URL might still be pointing to production. Click “Edit” to change the url.



**All Remote Sites**

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click

View: All Remote Sites Create New View

Action	Remote Site Name ↑	Namespace Prefix	Remote Site URL
Edit   Del	Box	Simpplr	https://www.box.com
Edit   Del	BoxAPIs	Simpplr	https://api.box.com
Edit   Del	BoxUploadAPIs	Simpplr	https://upload.box.com
Edit   Del	BoxViewAPIs	Simpplr	https://view-api.box.com
Edit   Del	Box_Content_API	-	https://api.box.com
Edit   Del	Box_Oauth	-	https://www.box.com
Edit   Del	Box_View_API	-	https://view-api.box.com
Edit   Del	Embedly_API	-	https://api.embed.ly
Edit   Del	Okta	-	https://simpplr.okta.com
Edit   Del	REST API URL	-	https://na40.salesforce.com
Edit   Del	Slack_API	-	https://slack.com
Edit   Del	VidvartAPI	Simpplr	https://ani.vidvart.com

Installation url:

For production or DE, use this link:

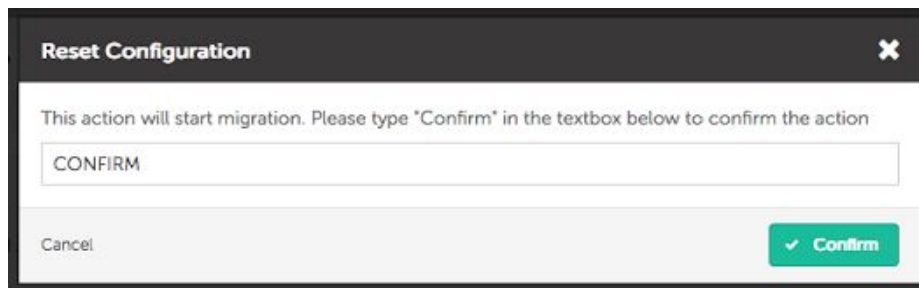
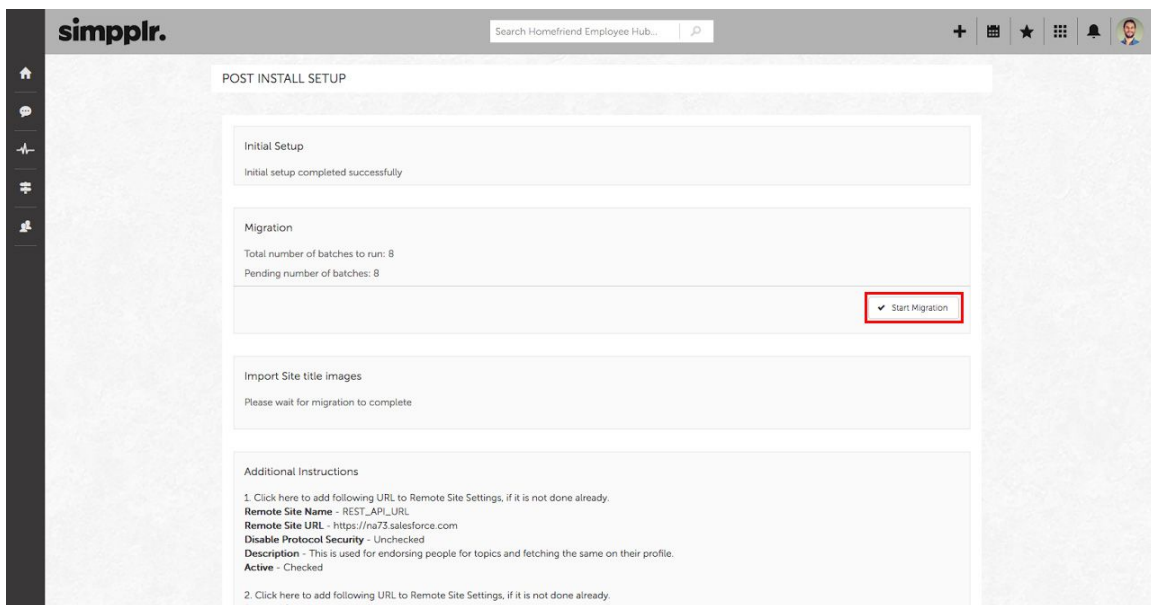
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t90000000Fbgh>

For Sandbox:

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04t90000000Fbgh>

Once you clicked on the link, select “All Users” and click “Upgrade”. Installation will take a little while. Once you have received an email from Salesforce that the installation is successful, take the following post installation steps:

- Go to Salesforce Setup > Installed Packages and click “Simplr”.
- Click “View” next to “Post Installation Instructions”.
- Click “Start Migration”, enter “confirm” and click “confirm”. The migration might take a little while. Please refresh the page to see the number of pending batches to run. When the migration completes, you should see “Migration completed successfully”



## POST INSTALL SETUP

---

### Initial Setup

Initial setup completed successfully

### Migration

Migration completed successfully

### Import Site title images

Site title image import completed successfully

If you want to monitor the migration and import process, you can go to Salesforce Setup> Apex Jobs and see the progress.

## Google Integration

Lower on the “Post Install Setup” page under “Additional Instructions”, at number 6 you should click on “Click here” and also at number 7 you should click on “Click here”.

6. [Click here](#) to add following URL to Remote Site Settings, if it is not done already.

**Remote Site Name** - Google\_Account

**Remote Site URL** - https://accounts.google.com

**Disable Protocol Security** - Unchecked

**Description** - Used to initiate Google OAuth and Token workflow

**Active** - Checked

7. [Click here](#) to add following URL to Remote Site Settings, if it is not done already.

**Remote Site Name** - Google\_API

**Remote Site URL** - https://www.googleapis.com

**Disable Protocol Security** - Unchecked

**Description** - Used to get Google Drive file information

**Active** - Checked

## Schedule Analytics

Go to Simpplr, go to “Manage Application” > “Setup” > “Schedulers”. Click on the drop down arrow for “SchedulerAnalytics” and click “Schedule”, and then “Clear Schedule”.

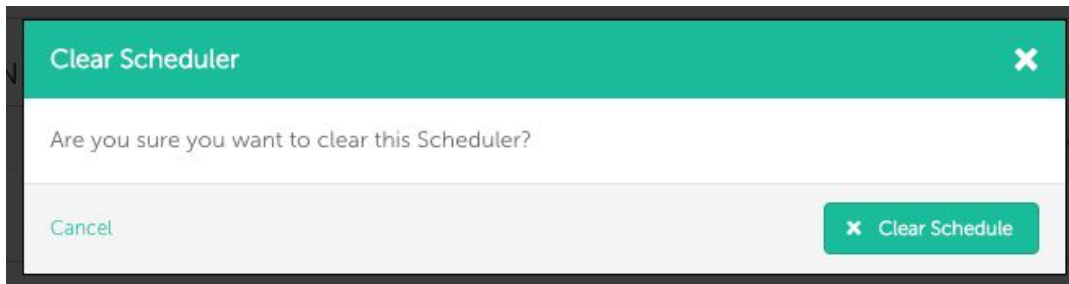
MANAGE APPLICATION

Setup Defaults People Launchpad Integrations Resets

General Governance Privileges Navigation Storage Email Schedulers Troubleshooting

Name	Last Run	Next Run	Options
SchedulerBatchPendingApprovalDigest	N/A	N/A	▼ □
SchedulerBatchAddUsersToMandatorySites	N/A	N/A	▼ □
SchedulerBatchInsertPeopleRecords	N/A	N/A	▼ □
SchedulerUserDataSync	N/A	N/A	▼ □
SchedulerBatchTopStories	N/A	N/A	▼ □
SchedulerBatchEmailDigest	N/A	N/A	▼ □
SchedulerBatchNotificationDigest	N/A	N/A	▼ □
SchedulerAnalytics	N/A	Oct 6, 2017 08:00:00 AM	▼ □
SchedulerNewsletter	N/A		▼ □

Run Now  
Clear Schedule



And then click “Schedule” again.

# MANAGE APPLICATION

Setup

Defaults

People

Launchpad

Integrations

Resets

General

Governance

Privileges

Navigation

Storage

Email

Schedulers

Troubleshooting

Name	Last Run	Next Run	Options
SchedulerBatchPendingApprovalDigest	N/A	N/A	<input type="checkbox"/> <input type="checkbox"/>
SchedulerBatchAddUsersToMandatorySites	N/A	N/A	<input type="checkbox"/> <input type="checkbox"/>
SchedulerBatchInsertPeopleRecords	N/A	N/A	<input type="checkbox"/> <input type="checkbox"/>
SchedulerUserDataSync	N/A	N/A	<input type="checkbox"/> <input type="checkbox"/>
SchedulerBatchTopStories	N/A	N/A	<input type="checkbox"/> <input type="checkbox"/>
SchedulerBatchEmailDigest	N/A	N/A	<input type="checkbox"/> <input type="checkbox"/>
SchedulerBatchNotificationDigest	N/A	N/A	<input type="checkbox"/> <input type="checkbox"/>
SchedulerAnalytics	N/A	N/A	<input type="checkbox"/> <input type="checkbox"/>
SchedulerNewsletter	N/A	N/A	<input type="checkbox"/> <input type="checkbox"/>

Run Now  
Schedule