

Winter 18 Upgrade Instructions (From Fall 17)

Please upgrade Simplr during off business hours. There will be some down time users cannot access Simplr 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	Simplr	https://www.box.com
Edit Del	BoxAPIs	Simplr	https://api.box.com
Edit Del	BoxUploadAPIs	Simplr	https://upload.box.com
Edit Del	BoxViewAPIs	Simplr	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://simplr.okta.com
Edit Del	REST API URL	-	https://na40.salesforce.com
Edit Del	Slack_API	-	https://slack.com
Edit Del	VirvardAPI	Simplr	https://ani.virvard.com

Installation url:

Production:

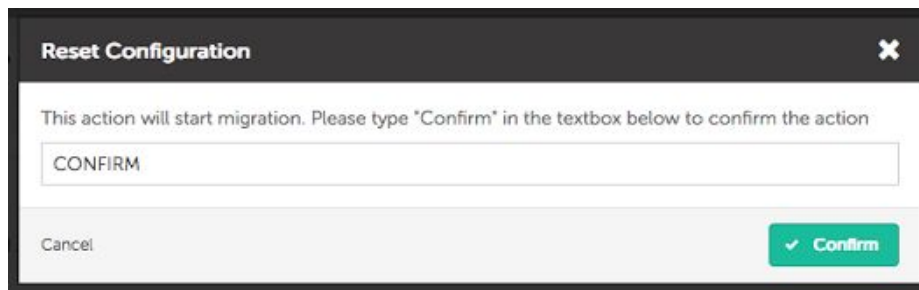
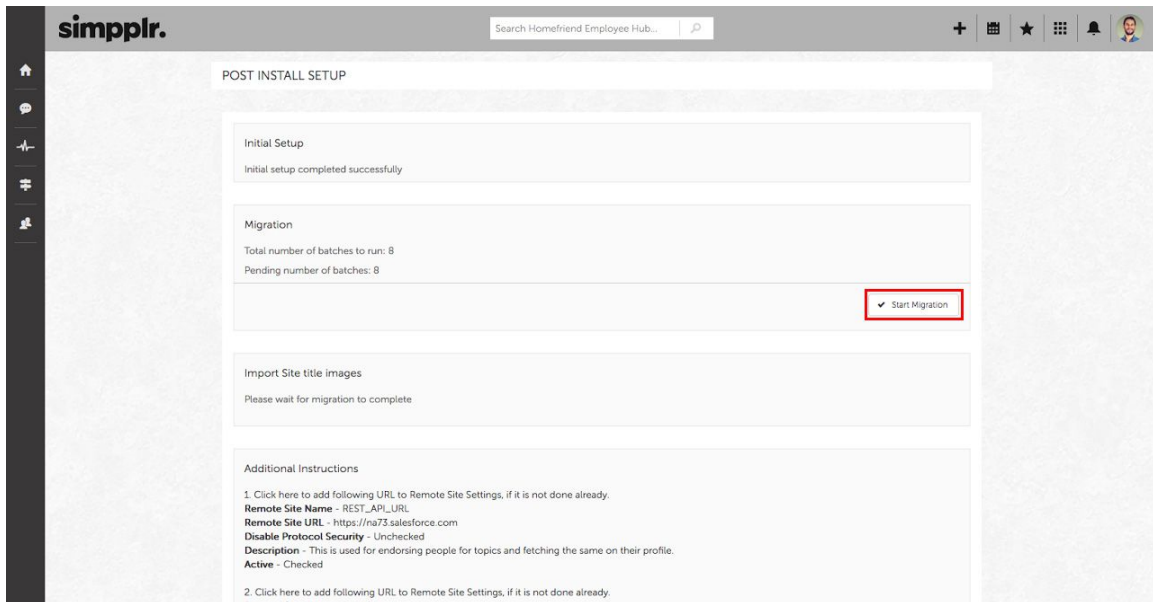
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t01000000XaDm>

Sandbox:

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04t01000000XaDm>

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 about 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.

Schedulers

Once the migration completes, go to Simplr.

1. Go to “Manage Application” > “Setup” > “Schedulers”.
2. Click on the drop down next to “SchedulerSimplrServices” arrow and click “Schedule”.

Manage Application

[Setup](#) [Defaults](#) [People](#) [Integrations](#) [Resets](#)

[General](#) [Governance](#) [Privileges](#) [Navigation](#) [Storage](#) [Email](#) [Schedulers](#) [Troubleshooting](#)

Name	Last Run	Next Run	Options
SchedulerBatchPendingApprovalDigest	N/A	May 2, 2018 at 12:01am	<input type="button" value="Run Now"/>
SchedulerBatchAddUsersToMandatorySites	May 1, 2018 at 12:05am	May 2, 2018 at 12:05am	<input type="button" value="Run Now"/>
SchedulerBatchInsertPeopleRecords	N/A	May 2, 2018 at 12:10am	<input type="button" value="Run Now"/>
SchedulerSimplrServices	May 1, 2018 at 12:20am	N/A	<input type="button" value="Run Now"/> <input type="button" value="Schedule"/>
SchedulerBatchTopStories	N/A		<input type="button" value="Run Now"/> <input type="button" value="Schedule"/>
SchedulerBatchEmailDigest	N/A	N/A	<input type="button" value="Run Now"/>