



This document outlines important information
for installation process for “Intelligent Third
Party Paper Extraction”

Brightleaf TPP Package for Salesforce - Installation Guide

Brightleaf Solutions, Inc.
Version 1.0 – 11/11/2021



Brightleaf TPP Package Installations

For Apttus/SF (A1)

Version 1.0

Last updated November 2021



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GETTING STARTED

This guide is designed to make the installation process as easy and efficient as possible.

REQUIREMENTS

- You must be a Salesforce System Administrator to install Brightleaf TPP package for Salesforce
- Below mentioned pre-requisite installed packages must be enabled for your org

1. Pre-requisite Installed Packages

Below is the list of packages which must be installed for the Brightleaf TPP package to work.

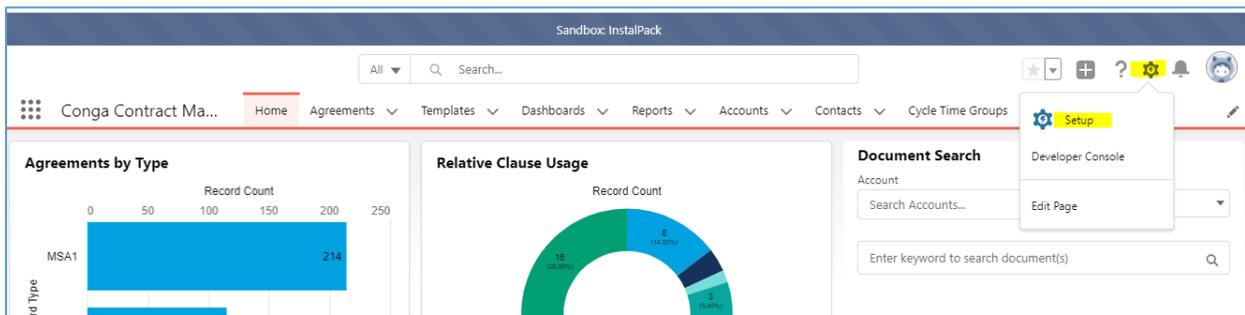
- Conga contract life cycle Management: 12.630
- Conga Base Library: 2.203

Login to your Org and check above packages are installed or not. To check this, follow the steps given below:

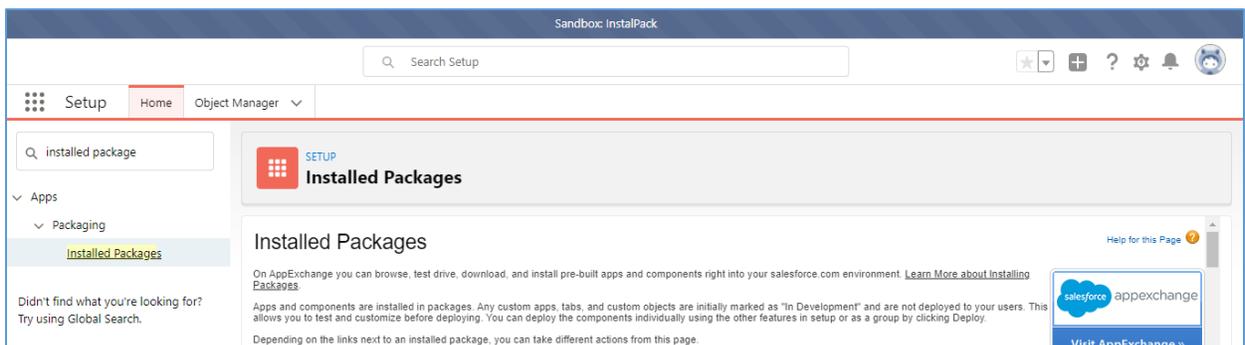
Steps:

Check the above-mentioned packages are available in the Org or not.

1.1 Click on the Gear icon on the top right side, go to Set up



1.2 In Quick Find box, type “Installed Packages”. Click on “Installed Packages” from the below list. The list of installed packages will appear in the right pane.





- 1.3 In the list, look for “Conga Contracts Lifecycle Management”, this package should be available in the installed packages.

Uninstall	Conga Contract Lifecycle Management	Apttus	12.605.2	Apttus	6/2/2021, 10:42 PM	<input type="checkbox"/>	3	30	93	Passed
Description This app is intended for demonstrators of salesforce.com. It accelerates the process to change the data in the Org to prepare for a demo to a prospect... The Conga Contract Lifecycle Management Suite gives you complete visibility and control of your contract process. Easy to deploy and use, you gain ben...										

- 1.4 Similarly, in the list look for “Conga Base Library”. This package should be available in the installed packages.

Uninstall	Conga Base Library	Apttus Base Org	2.150	Apttus_Base2	6/2/2021, 10:42 PM	<input type="checkbox"/>	2	7	7	Passed
Description Conga Base Library provides a shared library of reusable components other Conga packages may use.										

Note: For the documentation purpose, screenshots provided in this document throughout are shown for the Sandbox Org. This will vary for the Production Org.

2. Setup/Install Brightleaf TPP Package

The Brightleaf TPP package can be installed either in any Production or Sandbox Org.

Use the below URL for the Brightleaf Package installation for Apttus/SF (A1) Managed Package in the **Production Org**.

- <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5g0000005MJU>

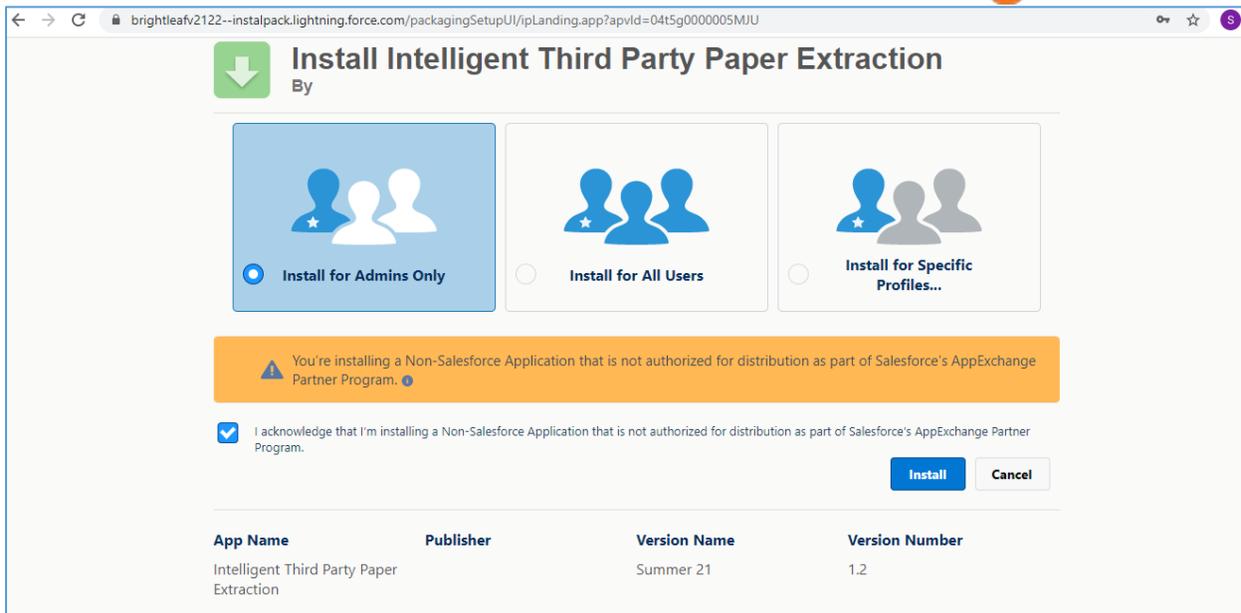
Use the below URL for the Brightleaf Package installation for Apttus/SF (A1) Managed Package in the **Sandbox Org**.

- <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t5g0000005MJU>

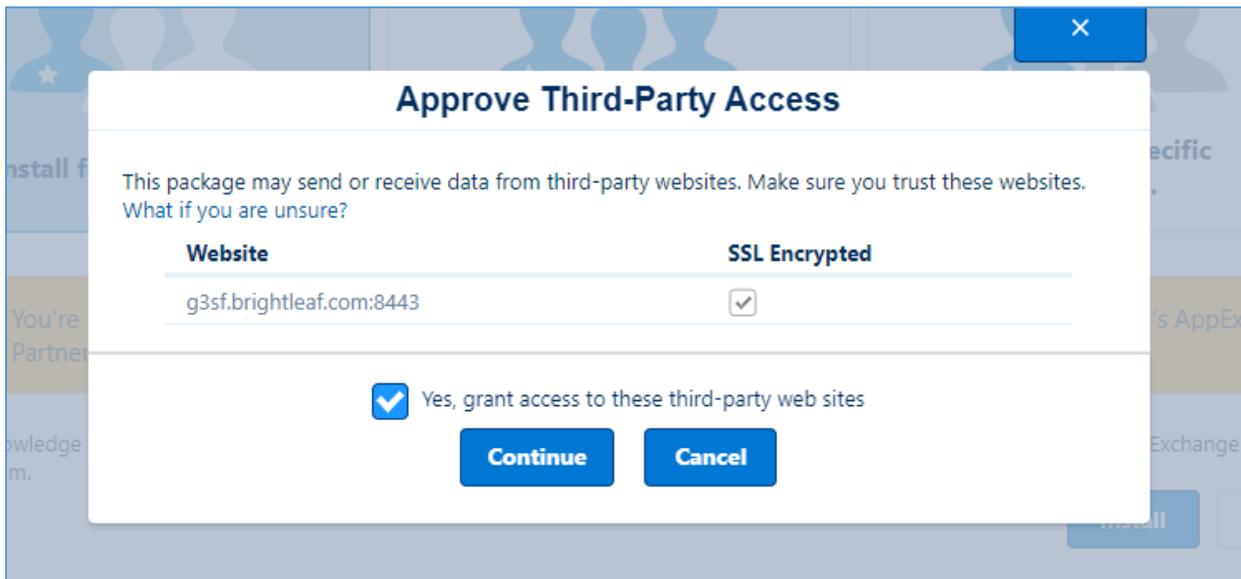
Note: The installation process will be performed using the main user credentials having the System Administrator profile and not of the Integration User.

Steps:

- 2.1 Copy/paste the Apttus/SF (A1) Managed Package link in browser. Hit enter.
- 2.2 It will ask for the login credentials
- 2.3 Enter the login credentials and user will be logged in and redirected to the installation page. The user will be one of the main user with System Administrator role
- 2.4 Select “Install for Admin only” option on installation page
- 2.5 Click the checkbox of Acknowledgement
- 2.6 Click on Install button



2.7 A popup will appear for the approval of Third Party Access



2.8 Click the checkbox "Yes, grant access to these third-party web sites"

2.9 Click on Continue button

2.10 Package Installing process will start



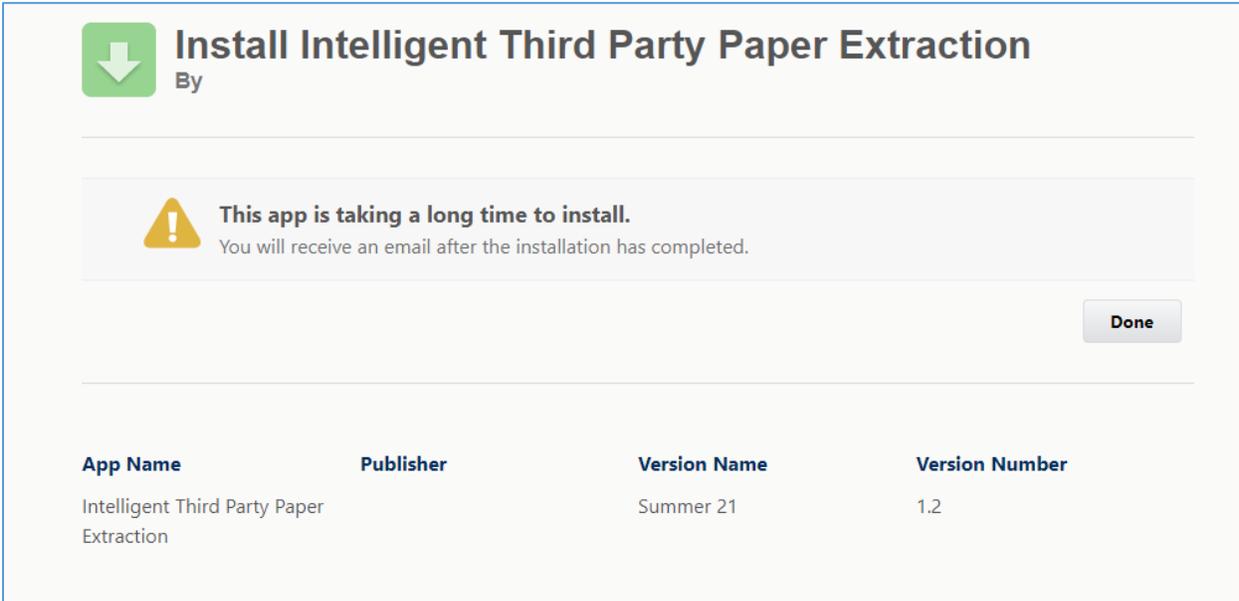
Install Intelligent Third Party Paper Extraction
By

 **Installing and granting access to admins Only...**

App Name	Publisher	Version Name	Version Number
Intelligent Third Party Paper Extraction		Summer 21	1.2

[Additional Details](#) [View Components](#)

2.11 Once the package is installed, the installation confirmation appears.



Install Intelligent Third Party Paper Extraction
By

 **This app is taking a long time to install.**
You will receive an email after the installation has completed.

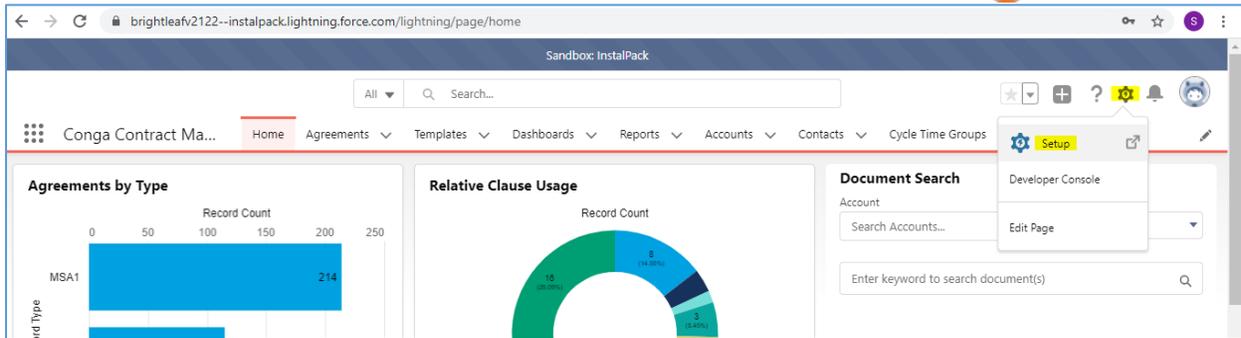
Done

App Name	Publisher	Version Name	Version Number
Intelligent Third Party Paper Extraction		Summer 21	1.2

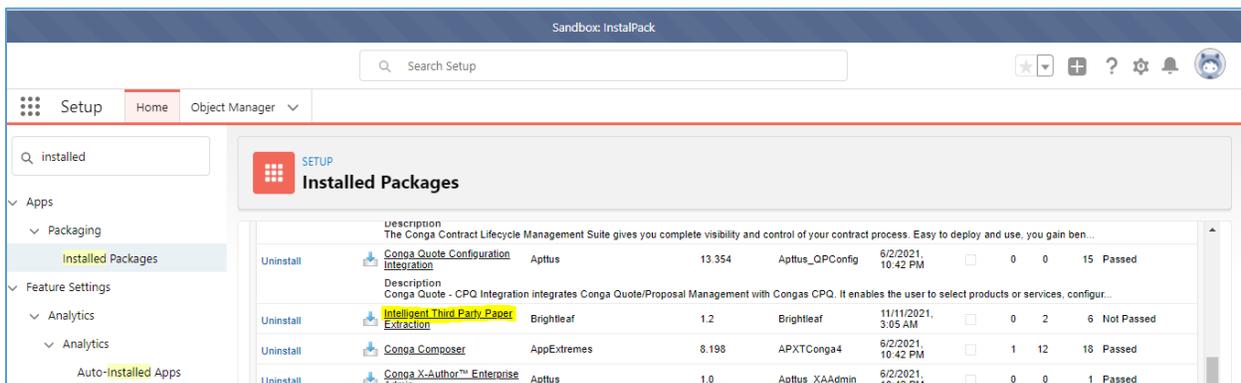
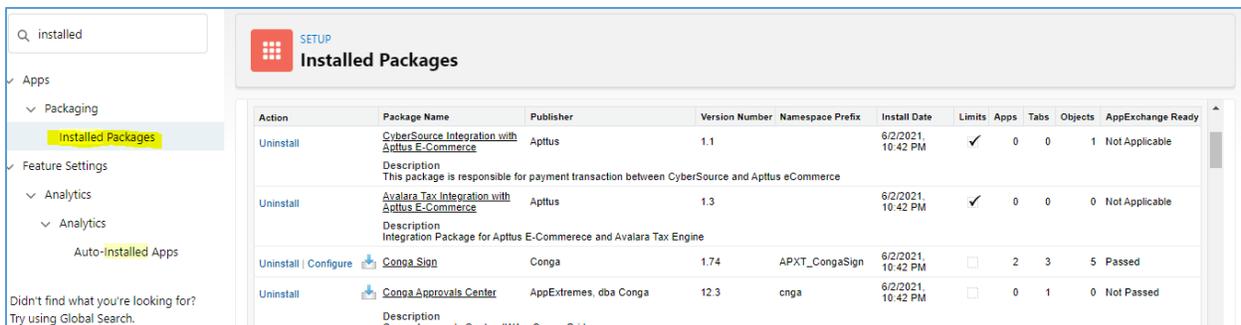
2.12 Click on Done.

2.13 Post Installation, go to installed packages and check “Intelligent Third Party Paper Extraction” appear in the list.

2.14 For this, Click on Gear icon on the top right side. Go to Setup.



2.15 In “Quick Find” box, type “Installed Packages”



3. Profile & Integration User Creation

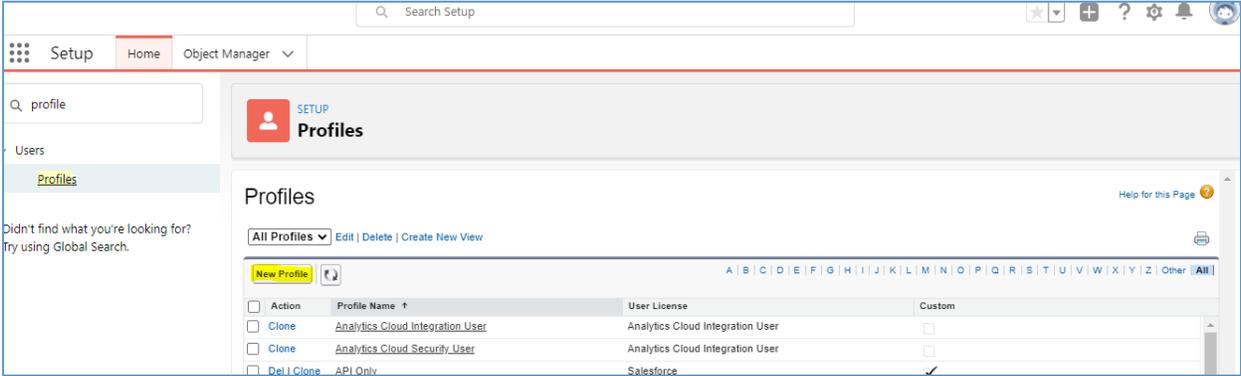
Create an Integration user and share the credentials to Brightleaf team.

Steps:

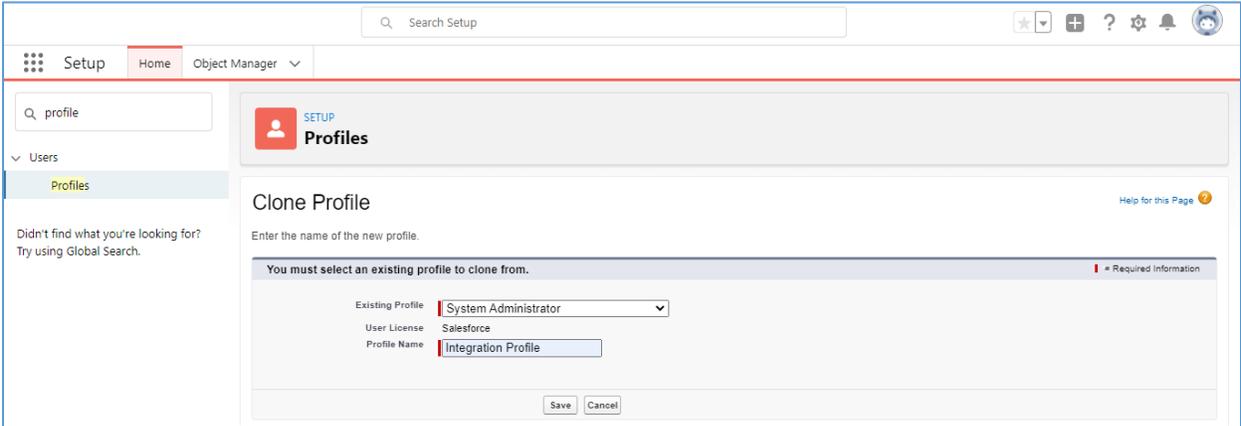
To create an Integration User, first need to create an Integration Profile and assign the created Integration Profile to the User

3.1 Click on Gear icon. Go to Set up

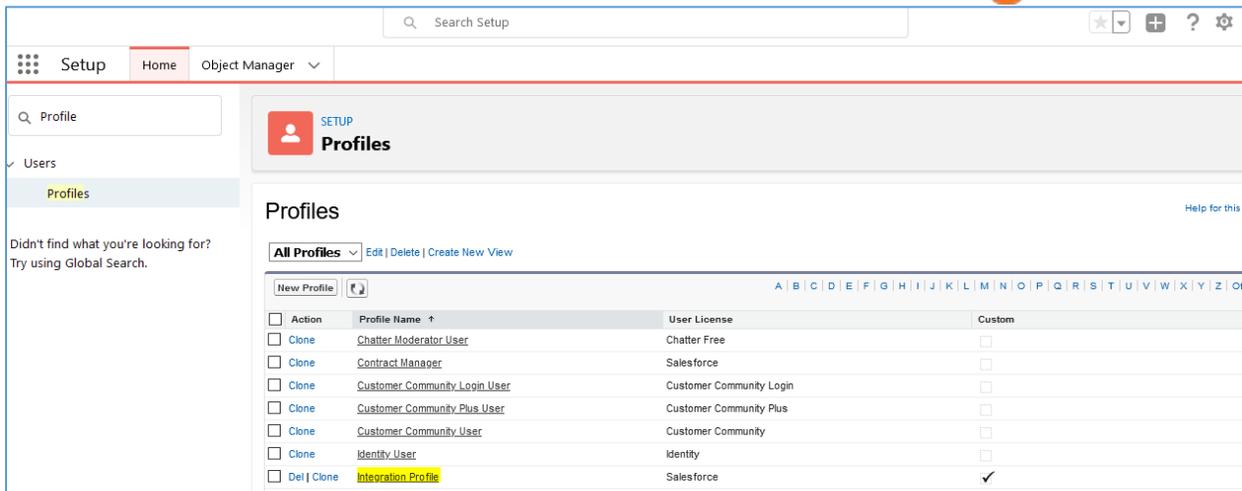
- 3.2 In the Quick Find, type “Profiles”
- 3.3 From the list below, click on Profiles in the left pane
- 3.4 Click on ‘New Profile’ button on the right pane



- 3.5 Select “System Administrator” for Existing Profile and give profile name as “Integration Profile”



- 3.6 Click on Save
- 3.7 The created profile will be shown in the list



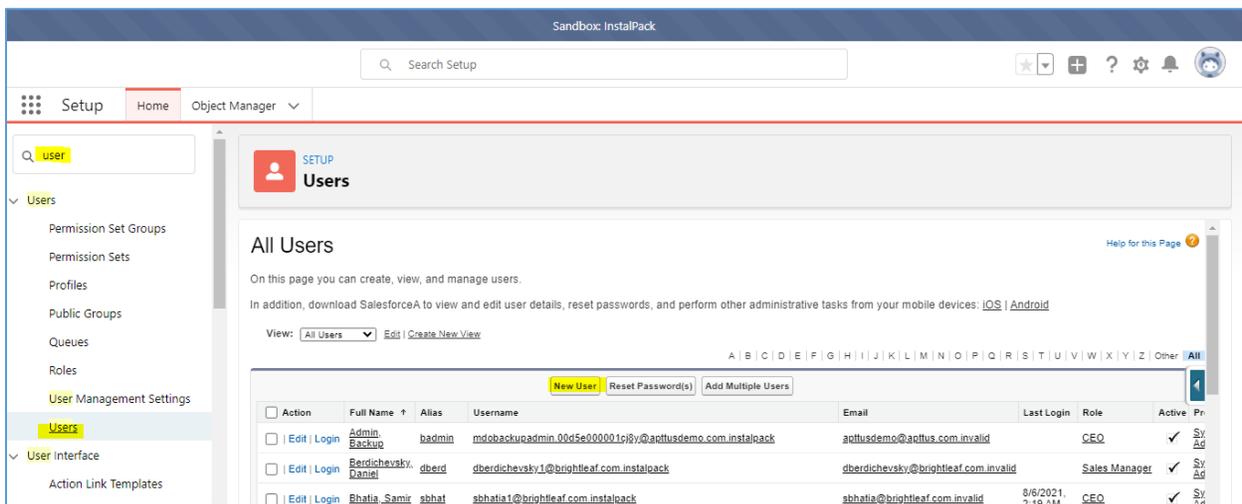
3.8 Create a User and assign the created 'Integration Profile' to it

3.8.1 Click on Gear icon. Go to Set up

3.8.2 In the Quick Find, type "Users"

3.8.3 From the list below, click on Users in the left pane

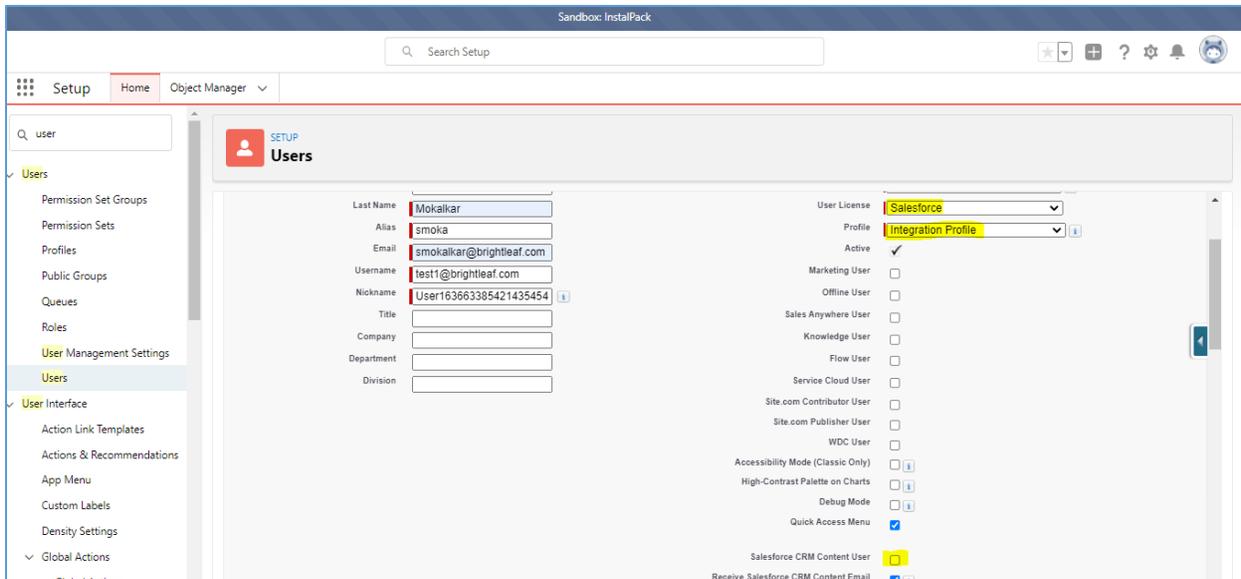
3.8.4 Click on 'New User' button on the right pane



3.8.5 A form will appear and fill the following details as an example:

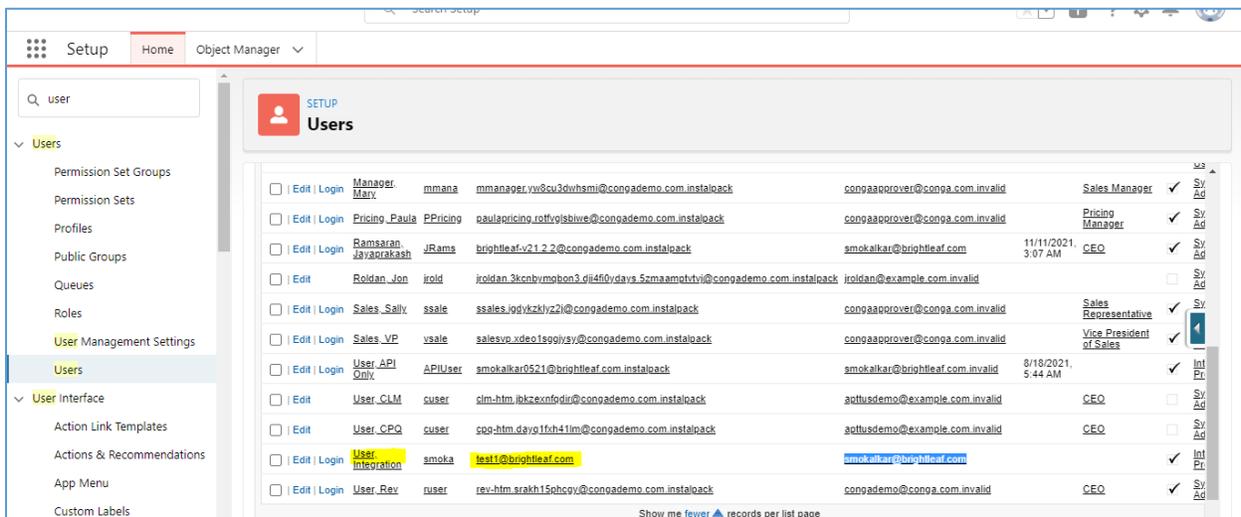
- First Name: User
- Last Name: Integration
- Email: smokalkar@brightleaf.com [change to your email address]
- Username: test1@brightleaf.com [change as per your req.]
- Role: CEO [change as per your req.]
- User License: Salesforce

- Profile: Integration Profile
- Salesforce CRM Content User: uncheck the checkbox



3.8.6 Click on Save

3.8.7 The Integration Users will be shown in the list of Users



4. Assign Permission to users

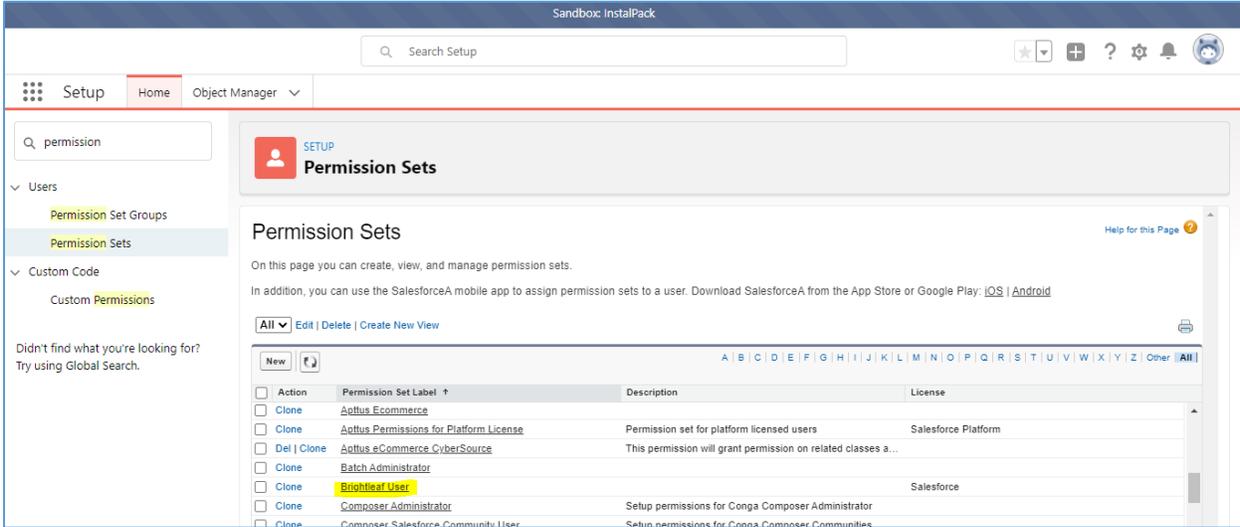
4.1 Assign 'Brightleaf User' permission set

Assign 'Brightleaf User' permission set to the main user (with which user logged in having System Administrator role) and the Integration User

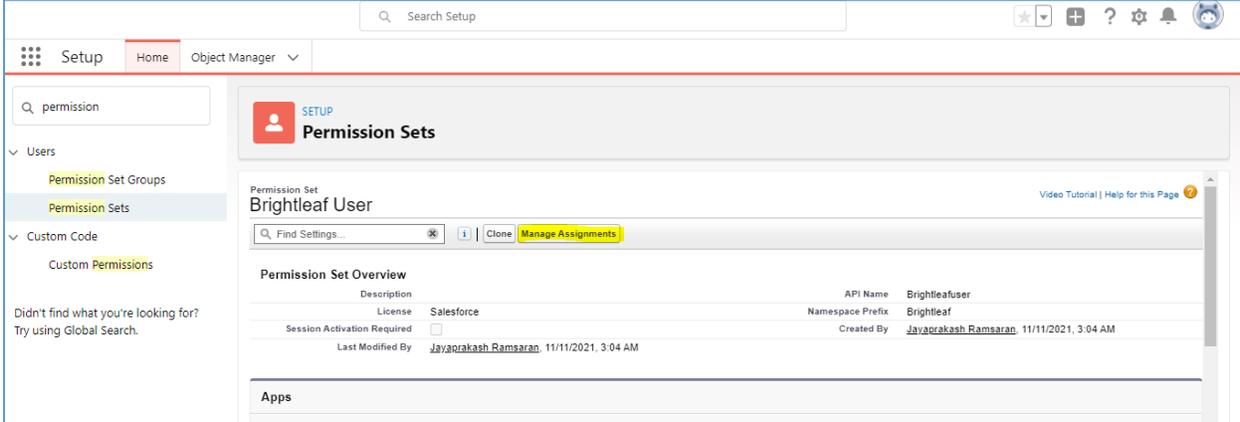
Steps:

4.1.1 Click on the Gear icon, go to Set up

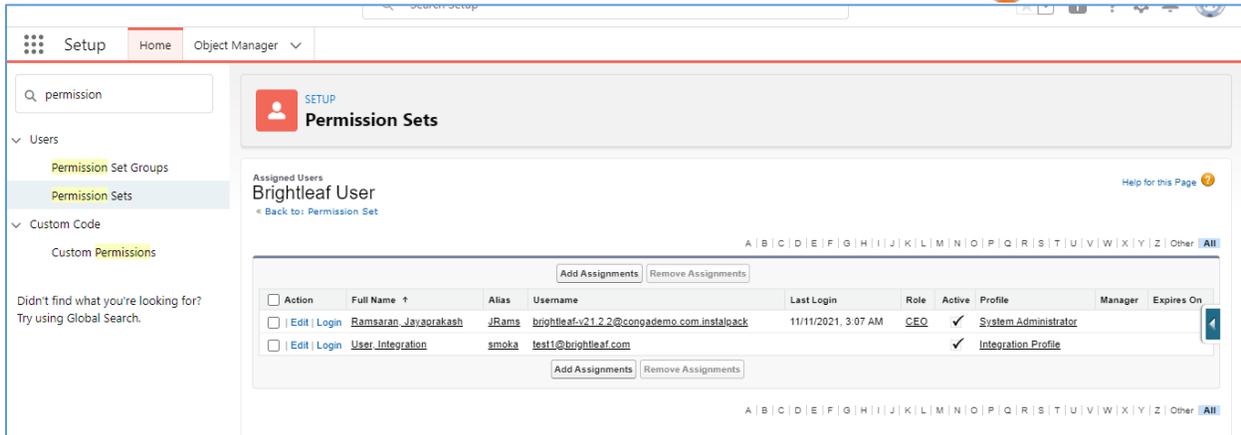
4.1.2 In Quick Find box, type “permission”. From the list below, click on “Permission Sets”. The list of permissions will be shown in right pane



4.1.3 Click on “Brightleaf User” permission



4.1.4 Click on “Manage Assignments” button



4.1.5 Select the Main User (user having System Administrator profile) and Integration User

4.1.6 Click on 'Add Assignment' button

4.1.7 Click on Done

The above steps will set 'Brightleaf User' permission set to the main user having system administrator profile and the Integration User.

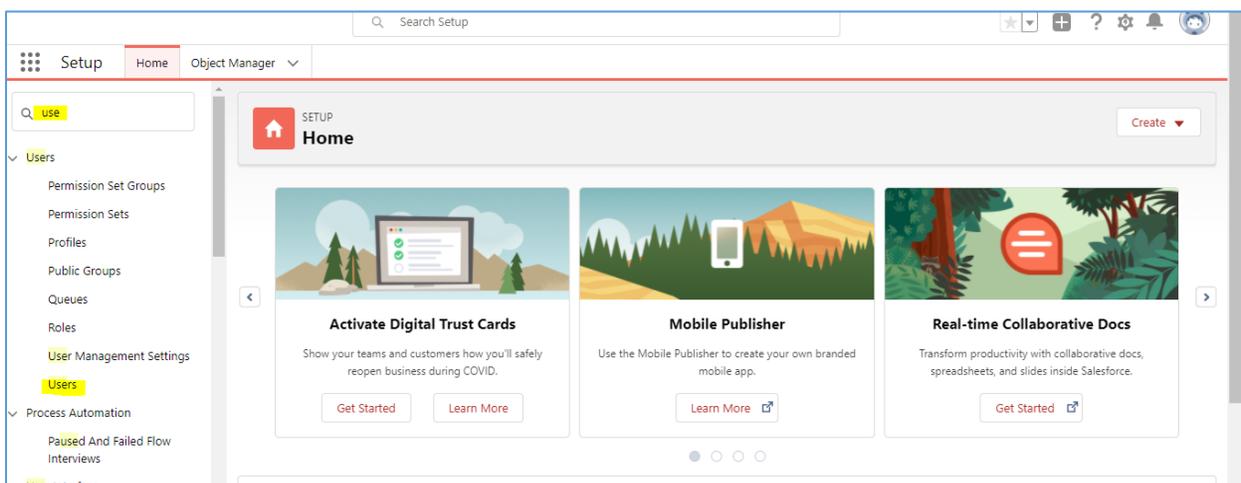
4.2 Assign 'IP range'

Usually every Org (either the Production or the Sandbox Org) will have its own IP range of addresses depending on the Client Org configuration. If none of the IP ranges are available in the Org, then follow below steps to add the IP ranges to the Integration User Profile.

Steps:

4.2.1 Click on the Gear icon on the top right side. Go to Set up

4.2.2 In Quick Find text field, type "Users". From the list, look for "Users"



4.2.3 Click on "Users"

4.2.4 From the list of Users, click on the User created with Integration Profile

Queues	Roles	User Management Settings	Users
<input type="checkbox"/> Edit Login	Sales_VP	vsale	salesvp.xdeo1s9gi@conqademo.com.instalock
<input type="checkbox"/> Edit Login	User_API	APIUser	smokalkar@brightleaf.com.instalock
<input type="checkbox"/> Edit	User_CLM	cuser	clm-htm.ikzcxnfrdir@conqademo.com.instalock
<input type="checkbox"/> Edit	User_CPO	cuser	cpg-htm.dayo1fxh41m@conqademo.com.instalock
<input type="checkbox"/> Edit Login	User_Integration	smoka	test1@brightleaf.com
<input type="checkbox"/> Edit Login	User_Rev	ruser	rev-htm.srakh15phcgv@conqademo.com.instalock

4.2.5 Click on the User Name

4.2.6 Go to Profile section of that particular user. Click on Profile Name

Users

User

Integration User

[Permission Set Assignments \(1\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Lightning Data Purchase Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Connected Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(0+\)](#) | [User Provisioning Accounts \(0\)](#)

[User Profile Help for this Page](#)

User Detail

Edit
Sharing
Reset Password
Login
Freeze

Name	Integration User	Role	
Alias	smoka	User License	Salesforce
Email	smokalkar@brightleaf.com	Profile	Integration Profile
Username	test1@brightleaf.com	Active	<input checked="" type="checkbox"/>
Nickname	User16366338542143545460 i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Sales Anywhere User	<input type="checkbox"/>

4.2.7 Navigate down and look for 'Login IP Ranges' under System. Click on the it

Profiles

System

System Permissions
Permissions to perform actions that apply across apps, such as "Modify All Data"

Login Hours
Settings that control when users can log in

Login IP Ranges
Settings that control the IP addresses from which users can log in

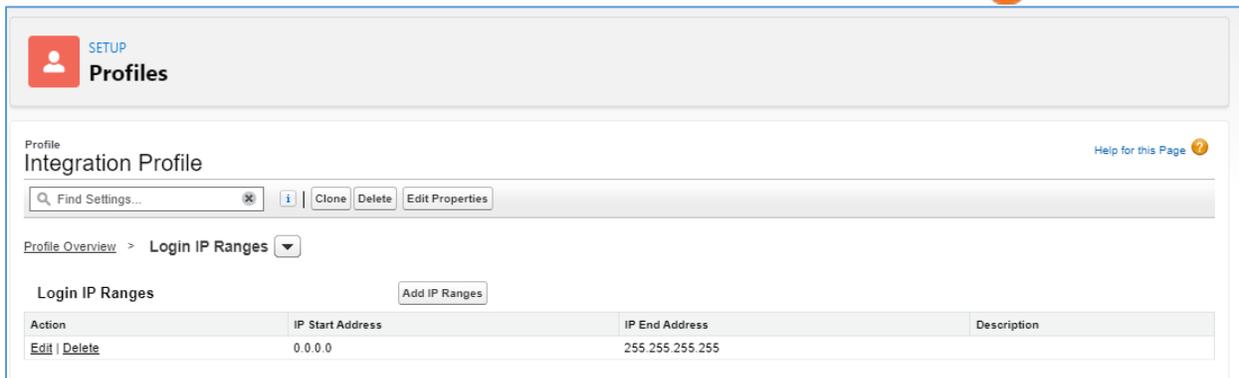
Service Providers
Permissions that let users switch to other websites using single sign-on.

Session Settings
Settings that control required session security level and timeout for inactive sessions

Password Policies
Profile Based password policies

Default Experience
Setting for assigning a default community to a user profile

4.2.8 If there are no list of IP ranges, then add it as per client requirement.



The screenshot shows the 'Profiles' section in the Brightleaf interface. Under the 'Integration Profile' section, the 'Login IP Ranges' tab is selected. A table lists the IP ranges:

Action	IP Start Address	IP End Address	Description
Edit Delete	0.0.0.0	255.255.255.255	

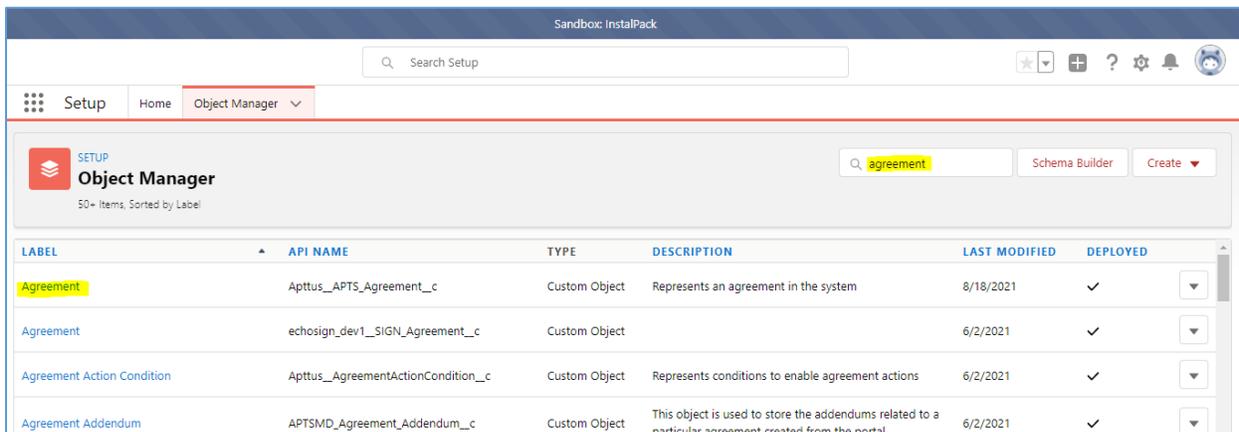
5. Import Status & Related List Configuration on Agreement layout

After package installation, add the below field on the Agreement layout.

- Brightleaf Import status

Steps:

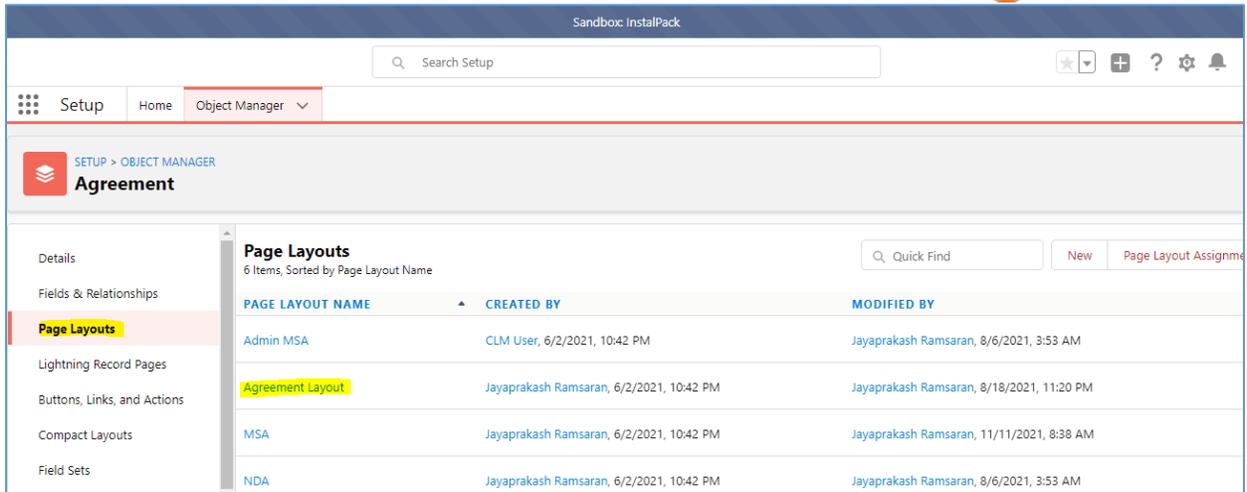
- Click on the Gear icon on the top right side. Go to Set up.
- Click on Object Manager tab
- In Quick Find text field, type "Agreement". From the list, look for "Agreement"



The screenshot shows the 'Object Manager' page in the Brightleaf interface. A search filter 'agreement' is applied. The following table lists the objects:

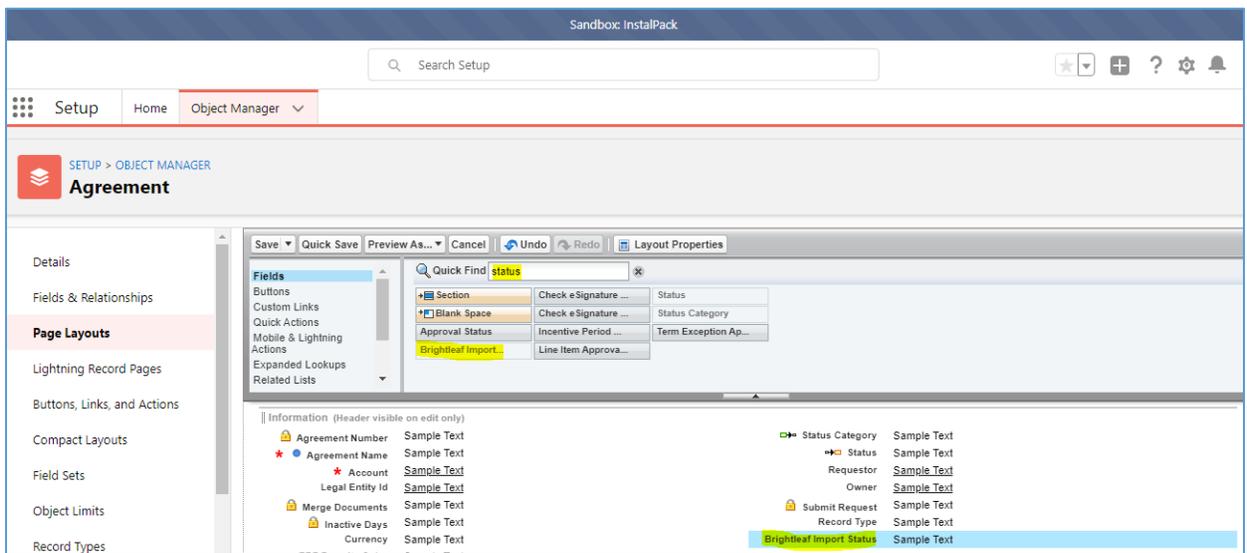
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Agreement	Apttus_APTS_Agreement_c	Custom Object	Represents an agreement in the system	8/18/2021	✓
Agreement	echosign_dev1_SIGN_Agreement_c	Custom Object		6/2/2021	✓
Agreement Action Condition	Apttus_AgreementActionCondition_c	Custom Object	Represents conditions to enable agreement actions	6/2/2021	✓
Agreement Addendum	APTSMD_Agreement_Addendum_c	Custom Object	This object is used to store the addendums related to a particular agreement created from the portal	6/2/2021	✓

- Click on "Agreement" whose API Name is 'Apttus_APTS_Agreement_c'
- Click on "Page Layouts" from Left pane
- Click on "Agreement Layout" from the Right pane



5.7 In the Quick Find box, type Status

5.8 Drag and Drop the Import Status field in the list of fields



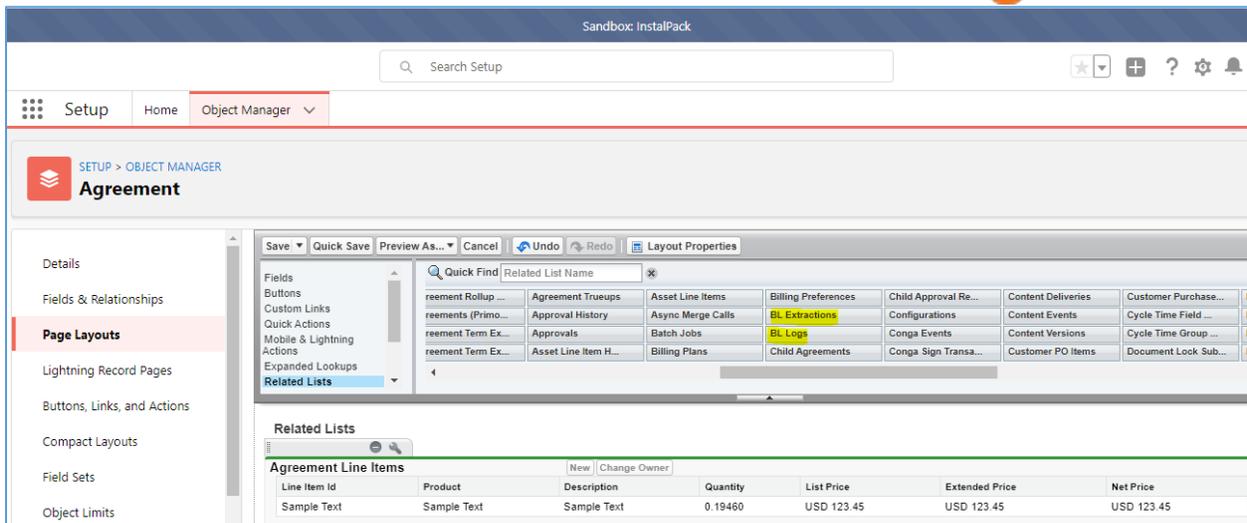
After Import Status is configured, next step is to add the related list tabs, add the below tabs on the Agreement layout.

- BL Logs
- BL Extraction

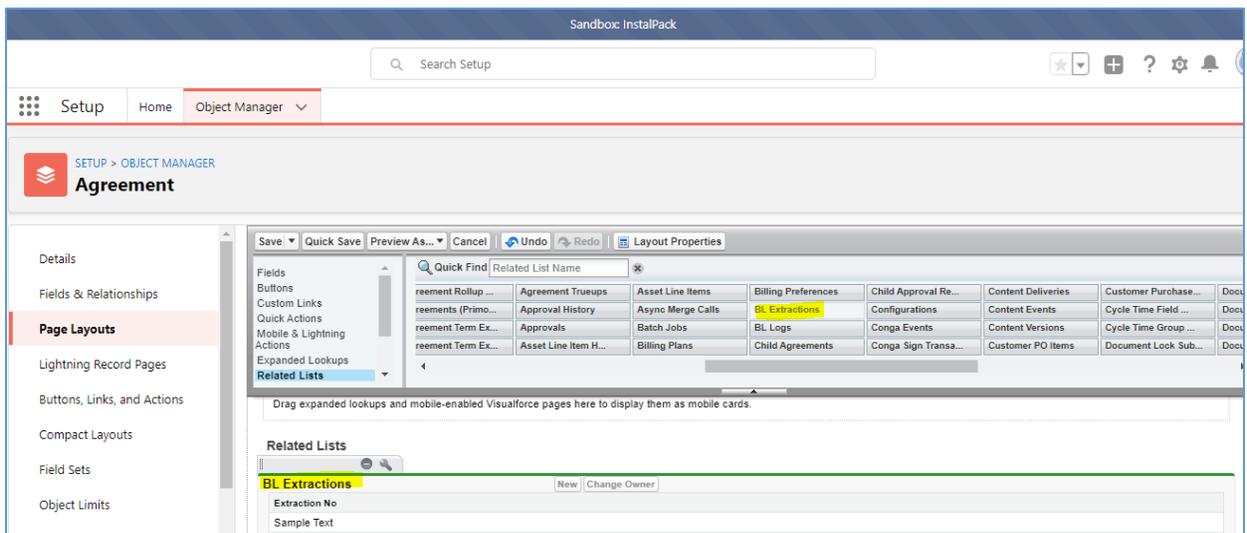
Steps:

5.10 In the "Agreement Layout", from the Fields list box, click on Related Fields List. The list of fields will be shown.

In the available list, "BL Logs" and "BL Extraction" are present.



5.11 Select “BL Extractions” and drag and drop it on the page wherever would like to appear



5.12 Similar way, select “BL Logs” and drag and drop it on the page wherever would like to appear

5.13 Click on Save

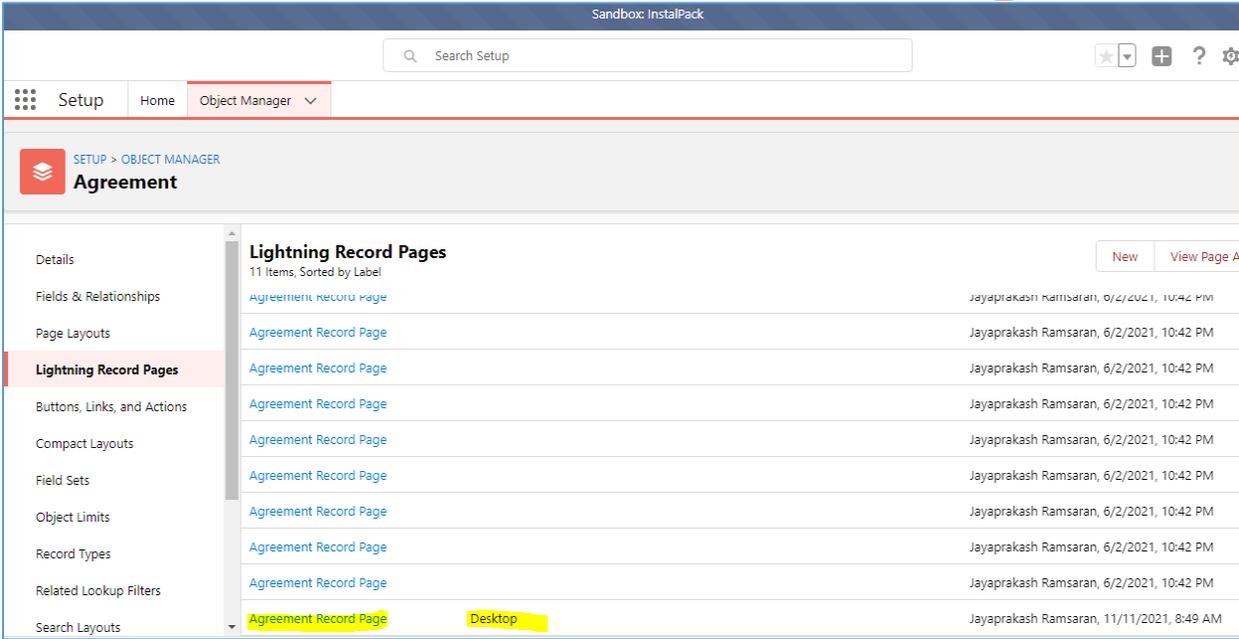
6. BL AgreementActions component on the Agreement page

Add the BL AgreementActions lightning component on the Agreement lightning page

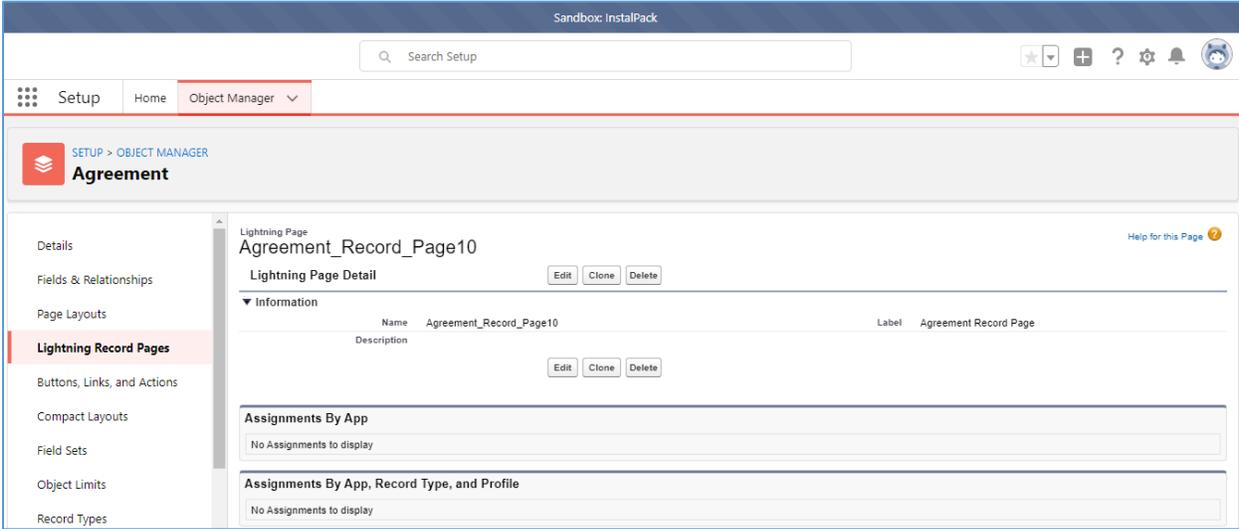
Steps:

6.1 In the Object Manager Tab, click on “Lightning Record Pages” from the left.

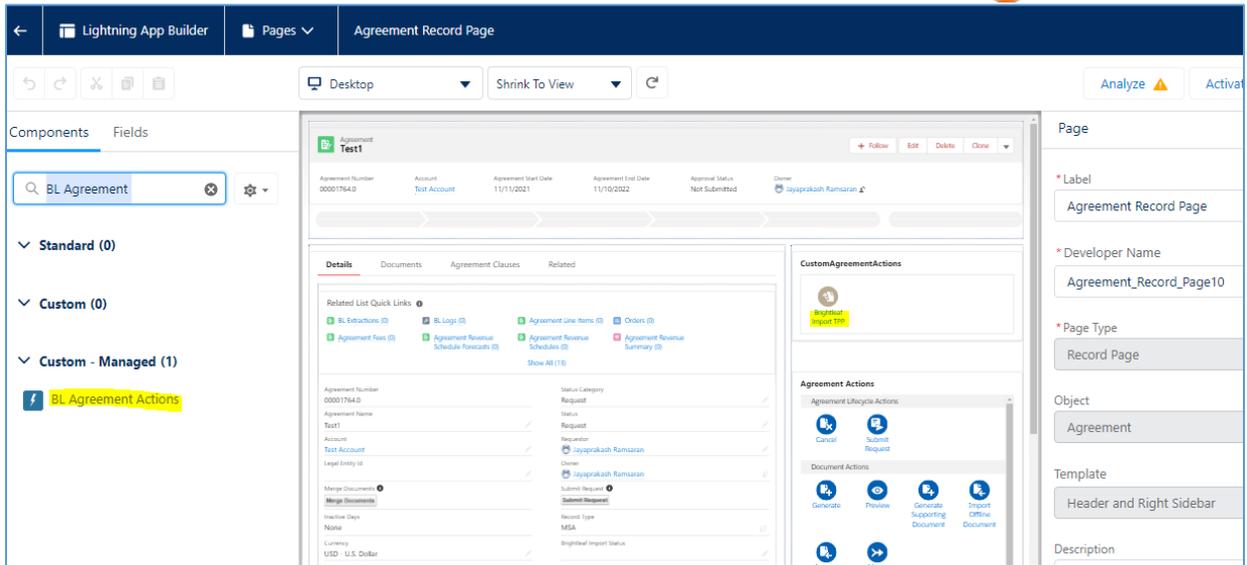
6.2 Click on ‘Agreement Record Page’ with Org Default as ‘Desktop’



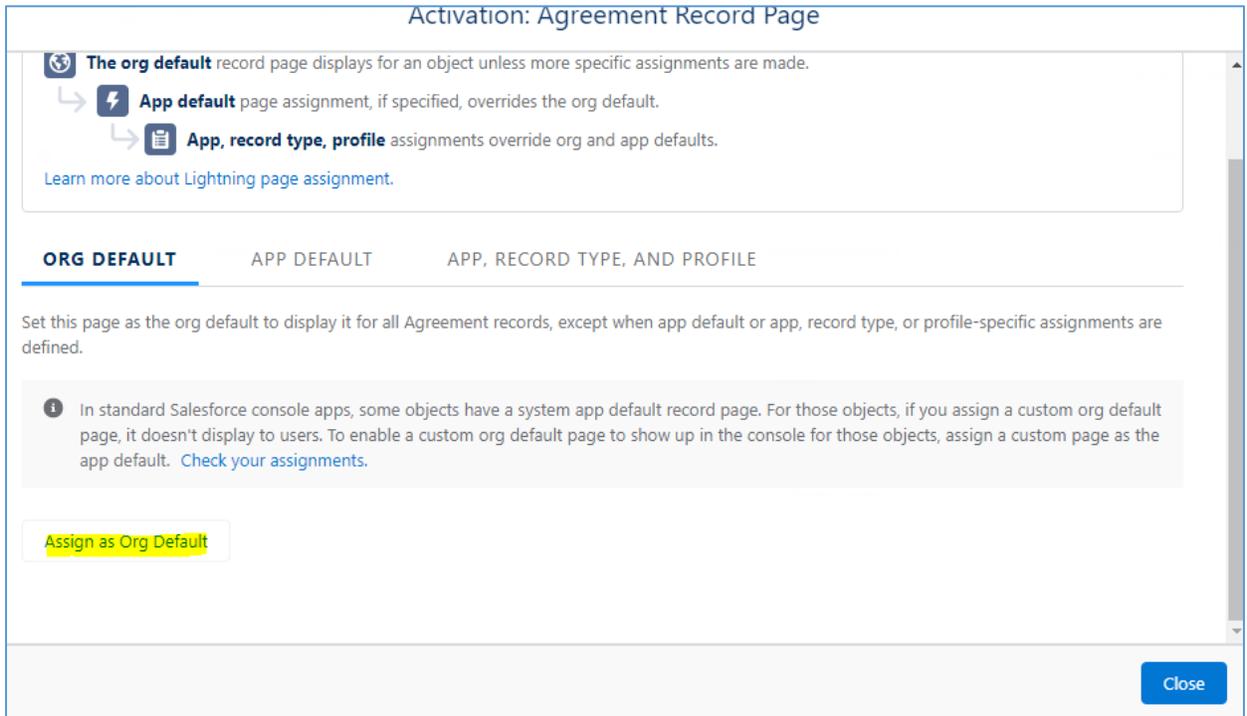
6.3 Click on Edit



6.4 From the left pane of “Page Builder” layout, in the search box type “BL Agreement Actions”. The option button will appear below. Drag and drop the “BL Agreement Actions” button on the right pane.



- 6.5 Click on Save
- 6.6 Click on Activation button
- 6.7 A popup will appear. In that popup, click on “Assign as Org Default”



Activation: Agreement Record Page

The org default record page displays for an object unless more specific assignments are made.

- ↳ **App default** page assignment, if specified, overrides the org default.
- ↳ **App, record type, profile** assignments override org and app defaults.

[Learn more about Lightning page assignment.](#)

ORG DEFAULT APP DEFAULT APP, RECORD TYPE, AND PROFILE

Set this page as the org default to display it for all Agreement records, except when app default or app, record type, or profile-specific assignments are defined.

i In standard Salesforce console apps, some objects have a system app default record page. For those objects, if you assign a custom org default page, it doesn't display to users. To enable a custom org default page to show up in the console for those objects, assign a custom page as the app default. [Check your assignments.](#)

Assign as Org Default

Close

- 6.8 Click on “Desktop and Phone”

Assign form factor

Select the form factors that you want your org default page to be available for.

Desktop
 Phone
 Desktop and phone

Cancel
Back
Next

6.9 Click on Next

Review assignment

Review Assignments (2)

Form Factor	Current Org Default	New Org Default
Desktop	Agreement Record Page	Agreement Record Page
Phone	System Default	Agreement Record Page

Cancel
Back
Save

6.10 Click on Save

6.11 Click on Activation

6.12 Click on Back button on the left side

6.13 Custom Agreement Action button (conditional Import/Review) will appear on the Agreement Details page when any Agreement record is created

7. Organization Id on Company Information page.

Capture the organization Id from the Company Information page

Steps:

admin booster

Convert Salesforce Ids from 15 to 18 characters

This page is a system converting many Salesforce IDs (vertical list) from 15 characters

00D760000008fo1

15 => 18

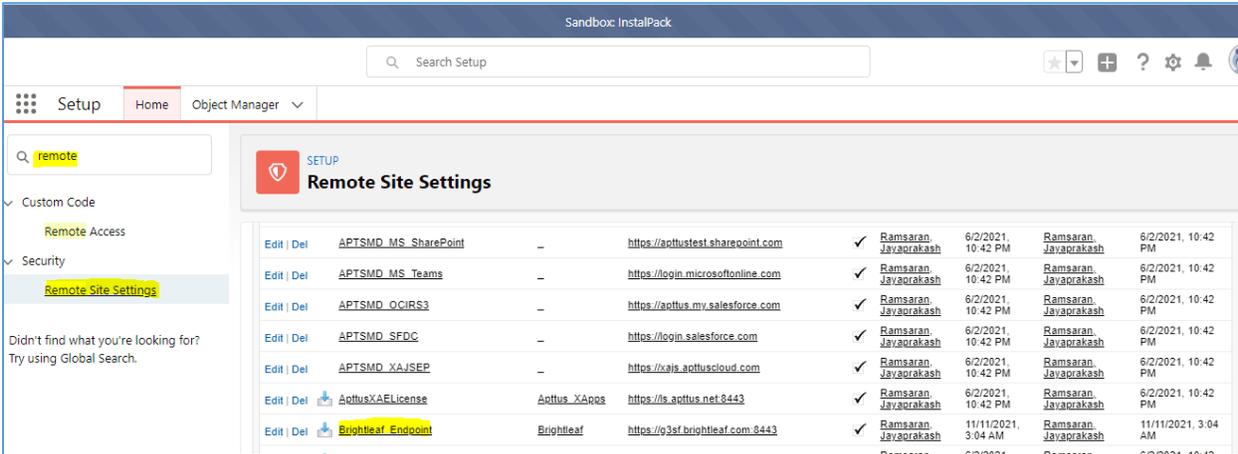
00D760000008fo1EAA

9. Brightleaf End Points at Salesforce Org

In the Salesforce Org, the end point with which it connects with Brightleaf is configurable. If the end point doesn't point to <https://preprod.brightleaf.com>, then follow below steps to change the end point, else ignore the below steps.

Steps:

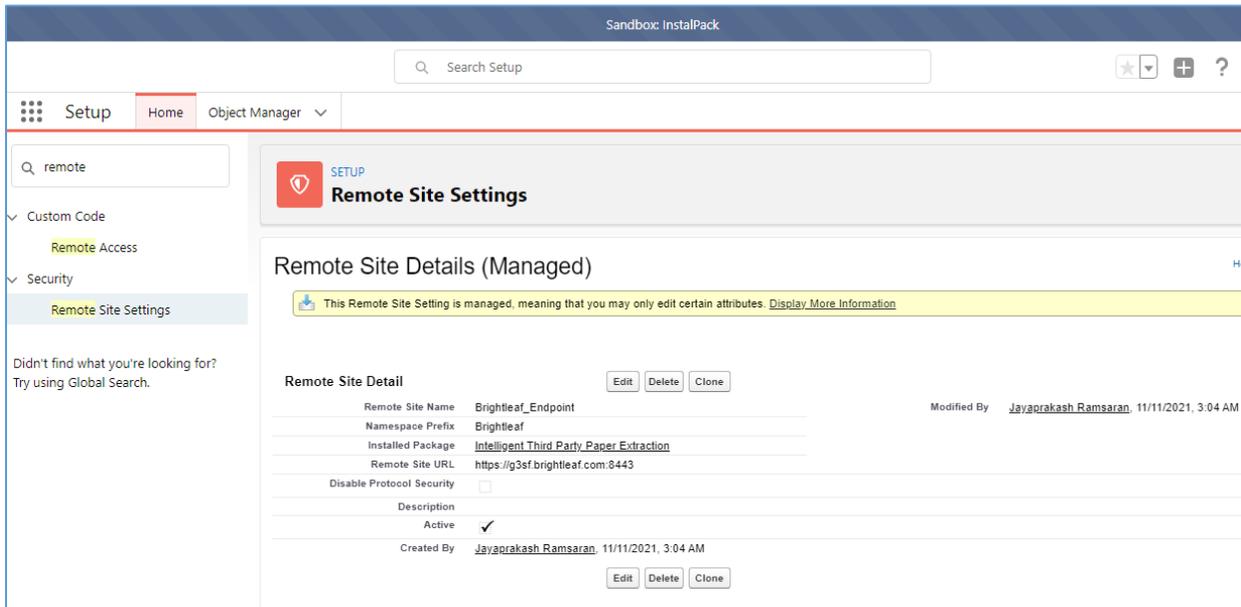
- 9.1 Click on Gear Icon and Go to Set up
- 9.2 In the Quick Find box, type "Remote Site Settings"



The screenshot shows the Salesforce Setup interface for 'Sandbox: InstalPack'. The 'Remote Site Settings' table is visible with the following data:

Label	API Name	URL	Checked	Created By	Created Date	Last Modified By	Last Modified Date
APTSMO_MS_SharePoint	APTSMO_MS_SharePoint	https://aottustest.sharepoint.com	✓	Ramsaran Javarakash	6/2/2021, 10:42 PM	Ramsaran Javarakash	6/2/2021, 10:42 PM
APTSMO_MS_Teams	APTSMO_MS_Teams	https://login.microsoftonline.com	✓	Ramsaran Javarakash	6/2/2021, 10:42 PM	Ramsaran Javarakash	6/2/2021, 10:42 PM
APTSMO_OCIRS3	APTSMO_OCIRS3	https://aottus.my.salesforce.com	✓	Ramsaran Javarakash	6/2/2021, 10:42 PM	Ramsaran Javarakash	6/2/2021, 10:42 PM
APTSMO_SFDC	APTSMO_SFDC	https://login.salesforce.com	✓	Ramsaran Javarakash	6/2/2021, 10:42 PM	Ramsaran Javarakash	6/2/2021, 10:42 PM
APTSMO_XAJSEP	APTSMO_XAJSEP	https://xajs.aottuscloud.com	✓	Ramsaran Javarakash	6/2/2021, 10:42 PM	Ramsaran Javarakash	6/2/2021, 10:42 PM
ActtusXAELicense	Acttus_XApos	https://s.aottus.net:8443	✓	Ramsaran Javarakash	6/2/2021, 10:42 PM	Ramsaran Javarakash	6/2/2021, 10:42 PM
Brightleaf_Endpoint	Brightleaf	https://q3af.brightleaf.com:8443	✓	Ramsaran Javarakash	11/11/2021, 3:04 AM	Ramsaran Javarakash	11/11/2021, 3:04 AM

9.3 Click on Brightleaf Endpoint



The screenshot shows the 'Remote Site Settings' page in the Brightleaf Setup console. The page title is 'Remote Site Settings' and it displays details for a managed remote site named 'Brightleaf_Endpoint'. A yellow banner at the top states: 'This Remote Site Setting is managed, meaning that you may only edit certain attributes. [Display More Information](#)'. Below this, the 'Remote Site Detail' section shows the following information:

- Remote Site Name: Brightleaf_Endpoint
- Namespace Prefix: Brightleaf
- Installed Package: [Intelligent Third Party Paper Extraction](#)
- Remote Site URL: <https://g3sf.brightleaf.com:3443>
- Disable Protocol Security:
- Description: (empty)
- Active:
- Created By: [Jayaprakash Ramsaran](#), 11/11/2021, 3:04 AM
- Modified By: [Jayaprakash Ramsaran](#), 11/11/2021, 3:04 AM

Buttons for 'Edit', 'Delete', and 'Clone' are visible for both the site name and the 'Created By' field.

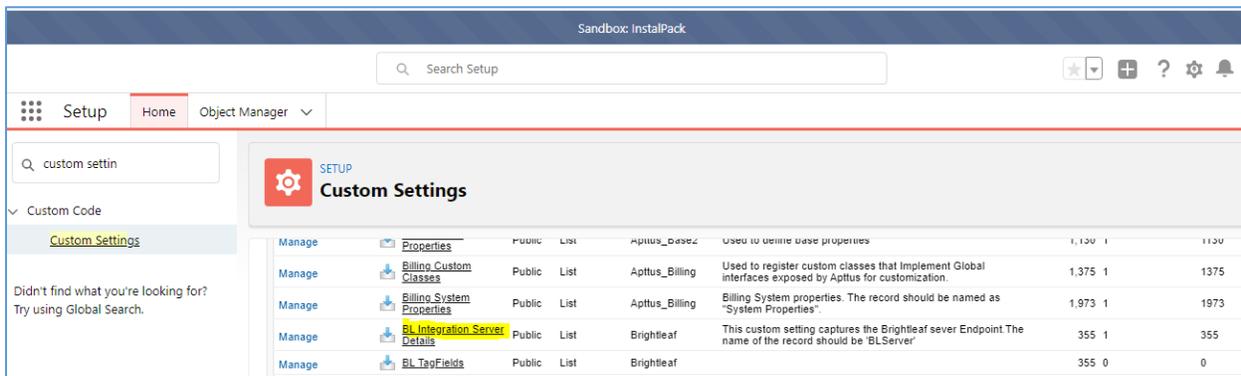
9.4 Click on Edit

9.5 Change the End Point to <https://preprod.brightleaf.com>

9.6 Click on Save

9.7 Again, click on Gear Icon and Go to Set up

9.7 In the Quick Find box, type "Custom Settings"



The screenshot shows the 'Custom Settings' page in the Brightleaf Setup console. The page title is 'Custom Settings' and it displays a list of custom settings. The search bar contains 'custom settin'. The list of settings is as follows:

Manage	Properties	Public	List	Apttus_Destz	Used to define base properties	1,120	1	1120
Manage	Billing Custom Classes	Public	List	Apttus_Billing	Used to register custom classes that implement Global interfaces exposed by Apttus for customization.	1,375	1	1375
Manage	Billing System Properties	Public	List	Apttus_Billing	Billing System properties. The record should be named as "System Properties".	1,973	1	1973
Manage	BL Integration Server Details	Public	List	Brightleaf	This custom setting captures the Brightleaf sever Endpoint. The name of the record should be 'BLServer'	355	1	355
Manage	BL TagFields	Public	List	Brightleaf		355	0	0

9.8 Click on "BL Integration Server Details"

Sandbox: InstallPack

Search Setup

Setup Home Object Manager

custom settin

Custom Code

Custom Settings

Didn't find what you're looking for? Try using Global Search.

Custom Settings

Custom Setting Definition

BL Integration Server Details

Create the fields for your custom setting. The data in these fields are cached with the application.

Custom Setting Definition Detail [Manage](#)

Label	BL Integration Server Details	Object Name	BLIntegrationserverDetails
API Name	Brightleaf__BLIntegrationserverDetails__c	Setting Type	List
Visibility	Public	Description	This custom setting captures the Brightleaf sever Endp name of the record should be 'BLServer'
Namespace Prefix	Brightleaf	Created Date	11/11/2021, 3:04 AM
Last Modified Date	11/11/2021, 3:04 AM	Record Size	355

9.9 Click on Manage

Sandbox: InstallPack

Search Setup

Setup Home Object Manager

custom settin

Custom Code

Custom Settings

Didn't find what you're looking for? Try using Global Search.

Custom Settings

Custom Setting

BL Integration Server Details

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

View: [All](#) [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

[New](#)

Action	Name
Edit Del	BLServer

9.10 Click on BLServer

Sandbox: InstallPack

Search Setup

Setup Home Object Manager

custom settin

Custom Code

Custom Settings

Didn't find what you're looking for? Try using Global Search.

Custom Settings

BL Integration Server Details Detail

[Back to List](#)

[Edit](#)

Name	BLServer	End Point	https://g3sf.brightleaf.com:8443/TextExtractionEngineServer/bitxe
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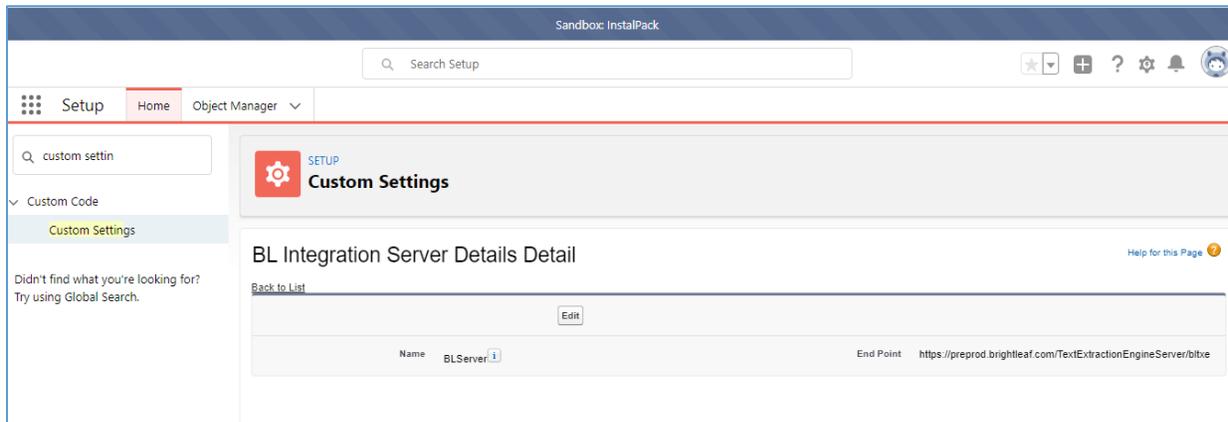
9.11 Click on Edit

9.12 Change the End Point to

<https://preprod.brightleaf.com/TextExtractionEngineServer/bltxe>

9.13 Click on Save

9.14 The End Point will show as



10. Share Details with Brightleaf

Client Id & Client secret is fixed for all the Orgs. For the Brightleaf Connected App to work, some configuration is required at the Brightleaf side. For this, following details are to be shared with Brightleaf:

- **Client Id:**
3MVG9fe4g9fhX0E45sVc_AUd6WdcUPON_xpsCD0g358tUF8r.K.cacpeNzTEwbF9SNaDbyRatdyTKdRa
eROEN
- **Client Secret:** F32C06481CC160DA22CF1273426175FE6F9B2F4AFBE0925B91AA0972D24FB8D0
- **Integration User Name:** Integration user name which is created
- **Integration User Password:** Integration user password which is created
- **Org Id:** Salesforce Org Id in which the Brightleaf TPP package is installed
- **Managed/Unmanaged:** The Org is Managed or Unmanaged
- **A1/C1:** The Org Type whether it is A1 or C1 Org

Brightleaf will register the Org details into its application and configure the required attributes at both Brightleaf and Salesforce side.

Above information should be shared with Brightleaf at tpp_aptus_support@brightleaf.com with subject "Brightleaf Connected App - Integration User Details"



11. Brightleaf for Salesforce Support

Reach out to Brightleaf for Salesforce Support for Salesforce-specific questions. For example, questions about your package Brightleaf with anything outlined in our Help articles.

Brightleaf for Salesforce Support can be reached by email at tpp_aptus_support@brightleaf.com.