AGILE CONNECTLINK™ INSTALLATION

Step-By-Step Instructions

Installation Instructions ▾ | Functionality ▾ | Glossary | FAQ ▾ | Best Practices

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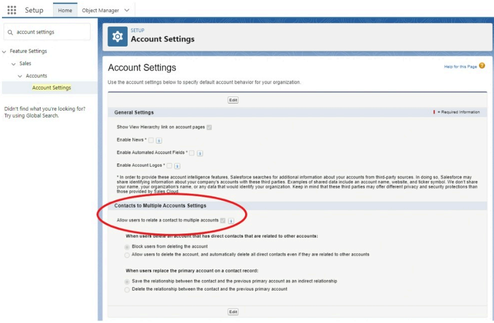
INSTALLATION

Thank you for choosing Agile's ConnectLink™ SalesForce integration application. These instructions should encompass everything you need to get started, but if questions arise at any time, please contact your Agile Account Manager for additional support.

1. Because contacts in schools or districts often have multiple roles and can be assigned to multiple buildings; Agile has chosen to utilize the standard "Related Account/Contacts Object" to avoid the creation of duplicate contacts. Before installation, this package requires that the "Allow users to relate a contact to multiple account" setting to be enabled – which is off by default. If it's already enabled, you can skip to **Step 2** below.
   - To Enable the Related Account/Contact object you need to go to the "Account Settings" in the setup menu. See the screenshot to the right:

Note: Enabling this setting may take a while. A related list for both contacts and account will be enabled and for any contact related to an account a related contact record will be created. These records are required by the app as they do not take any additional storage space and allow educators (contacts) to be related to as many institutions (accounts) as necessary.

Note: Salesforce recommends adjusting your activity settings to not automatically roll up to a contact's primary account. See [Enable Roll Up of Activities to a Contact's Primary Account (salesforce.com)]() for more information.



Setup
Home
Object Manager
account settings
Feature Settings
Sales
Accounts
Account Settings
Didn't find what you're looking for? Try using Global Search.
SETUP
Account Settings
Help for this Page
Edit

Account Settings

Use the account settings below to specify default account behavior for your organization.

General Settings — = Required Information

Show View Hierarchy link on account pages ☑

Enable News * ☐

Enable Automated Account Fields * ☐

Enable Account Logos * ☐

* In order to provide these account intelligence features, Salesforce searches for additional information about your accounts from third-party sources. In doing so, Salesforce may share identifying information about your company's accounts with these third parties. Examples of shared data include an account name, website, and ticker symbol. We don't share your name, your organization's name, or any data that would identify your organization. Keep in mind that these third parties may offer different privacy and security protections than those provided by Sales Cloud.

Contacts to Multiple Accounts Settings

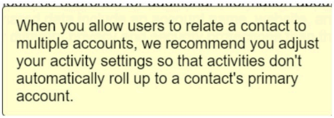
Allow users to relate a contact to multiple accounts ☑

When users delete an account that has direct contacts that are related to other accounts:

● Block users from deleting the account
○ Allow users to delete the account, and automatically delete all direct contacts even if they are related to other accounts

When users replace the primary account on a contact record:

● Save the relationship between the contact and the previous primary account as an indirect relationship
○ Delete the relationship between the contact and the previous primary account



When you allow users to relate a contact to multiple accounts, we recommend you adjust your activity settings so that activities don't automatically roll up to a contact's primary account.

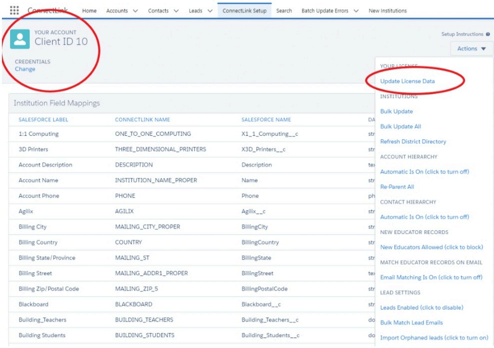
2. The [latest version 4.6]() of the ConnectLink™ Application can be downloaded by clicking on the link below or through the App Exchange. **Please install for all users.**

[Production]()

[Sandbox]()

3. Once the app is downloaded, you will need to complete the ConnectLink Setup to access your licensed data from the Agile database through ConnectLink. With these installation instructions, you received both your Client ID and Client Key from your Agile Account Manager.

4. In ConnectLink Setup, add your credentials (the Client ID and Client Key)
5. Next under Actions, click “Update License Data” to retrieve the fields associated with your data license. You will also need to click “Update License Data” anytime that changes are made to your data license.


ConnectLink
Home
Accounts
Contacts
Leads
ConnectLink Setup
Search
Batch Update Errors
New Institutions
Setup Instructions
Actions
YOUR LICENSE
Update License Data
INSTITUTIONS
Bulk Update
Bulk Update All
Refresh District Directory
ACCOUNT HIERARCHY
Automatic Is On (click to turn off)
Re-Parent All
CONTACT HIERARCHY
Automatic Is On (click to turn off)
NEW EDUCATOR RECORDS
New Educators Allowed (click to block)
MATCH EDUCATOR RECORDS ON EMAIL
Email Matching Is On (click to turn off)
LEAD SETTINGS
Leads Enabled (click to disable)
Bulk Match Lead Emails
Import Orphaned leads (click to turn on)

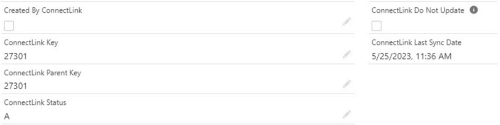
YOUR ACCOUNT
Client ID 10

CREDENTIALS
Change

Institution Field Mappings

SALESFORCE LABEL	CONNECTLINK NAME	SALESFORCE NAME	DA
1:1 Computing	ONE_TO_ONE_COMPUTING	X1_1_Computing__c	str
3D Printers	THREE_DIMENSIONAL_PRINTERS	X3D_Printers__c	str
Account Description	DESCRIPTION	Description	tex
Account Name	INSTITUTION_NAME_PROPER	Name	str
Account Phone	PHONE	Phone	ph
Agilix	AGILIX	Agilix__c	str
Billing City	MAILING_CITY_PROPER	BillingCity	str
Billing Country	COUNTRY	BillingCountry	str
Billing State/Province	MAILING_ST	BillingState	str
Billing Street	MAILING_ADDR1_PROPER	BillingStreet	tex
Billing Zip/Postal Code	MAILING_ZIP_5	BillingPostalCode	str
Blackboard	BLACKBOARD	Blackboard__c	str
Building_Teachers	BUILDING_TEACHERS	Building_Teachers__c	do
Building Students	BUILDING_STUDENTS	Building_Students__c	do

6. During the installation process, several fields were added to your Salesforce subscription as custom fields.



Created By ConnectLink
☐

ConnectLink Key
27301

ConnectLink Parent Key
27301

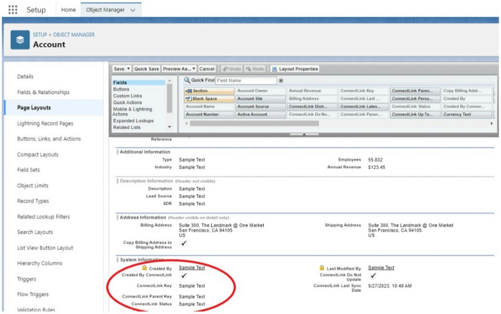
ConnectLink Status
A

ConnectLink Do Not Update
☐

ConnectLink Last Sync Date
5/25/2023, 11:36 AM

- The added account fields include:
    1. Created by ConnectLink
    2. ConnectLink Key
    3. ConnectLink Last Sync Date
    4. ConnectLink Parent Key
    5. ConnectLink Status
    6. ConnectLink Do Not Update
- The added contact fields include:
    1. Created by ConnectLink
    2. ConnectLink Key
    3. ConnectLink Last Sync Date
    4. ConnectLink Status
    5. ConnectLink Do Not Update
- The added lead fields include:
    1. Created by ConnectLink
    2. ConnectLink Key
    3. ConnectLink Last Sync Date
    4. ConnectLink Status
    5. ConnectLink Do Not Update
- The added related account/contact fields include:
    1. Compound Key Ext
    2. Compound Key Formula
    3. ConnectLink Inactive Roles
    4. ConnectLink Roles

Note: You’ll need to add the ConnectLink Key, Parent Key, and ConnectLink Status fields to your account layout in Salesforce to support the ConnectLink integration. The ConnectLink Key and ConnectLink Status needs to be added to the contact layout as well. Lastly, the ConnectLink Sync, ConnectLink Matching, and Report CL Data Problem custom buttons should be added to both the account layout as well as the contact layout.


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Account
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Hierarchy Columns
Triggers
Flow Triggers
Validation Rules
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Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
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Buttons
Custom Links
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Quick Find
Field Name
Section
Blank Space
Account Name
Account Number
Account Owner
Account Site
Account Source
Active Account
Annual Revenue
Billing Address
ConnectLink Distr...
ConnectLink Do No...
ConnectLink Key
ConnectLink Last ...
ConnectLink Lates...
ConnectLink Paren...
ConnectLink Paren...
ConnectLink Perso...
ConnectLink Status
ConnectLink Up To...
Copy Billing Addr...
Created By
Created By Connec...
Currency Test

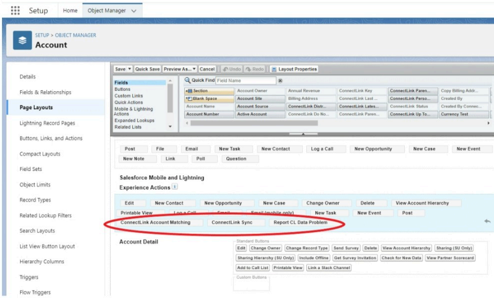
Reference

Additional Information
Type Sample Text
Industry Sample Text
Employees 55,832
Annual Revenue $123.45

Description Information (Header not visible)
Description Sample Text
Lead Source Sample Text
SDR Sample Text

Address Information (Header visible on detail only)
Billing Address Suite 300, The Landmark @ One Market San Francisco, CA 94105 US
Shipping Address Suite 300, The Landmark @ One Market San Francisco, CA 94105 US
Copy Billing Address to Shipping Address ✓

System Information
Created By Sample Text
Created By ConnectLink ✓
ConnectLink Key Sample Text
ConnectLink Parent Key Sample Text
ConnectLink Status Sample Text
Last Modified By Sample Text
ConnectLink Do Not Update ✓
ConnectLink Last Sync Date 5/27/2023, 10:49 AM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Quick Find
Field Name
Section
Blank Space
Account Name
Account Number
Account Owner
Account Site
Account Source
Active Account
Annual Revenue
Billing Address
ConnectLink Distr...
ConnectLink Do No...
ConnectLink Key
ConnectLink Last ...
ConnectLink Lates...
ConnectLink Paren...
ConnectLink Paren...
ConnectLink Perso...
ConnectLink Status
ConnectLink Up To...
Copy Billing Addr...
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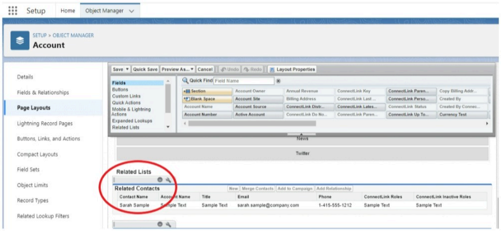
Created By Connec...
Currency Test
Post
File
Email
New Task
New Contact
Log a Call
New Opportunity
New Case
New Event
New Note
Link
Poll
Question
Salesforce Mobile and Lightning Experience Actions
Edit
New Contact
New Opportunity
New Case
Change Owner
Delete
View Account Hierarchy
Printable View
Log a Call
Email
Email (mobile only)
New Task
New Event
Post
ConnectLink Account Matching
ConnectLink Sync
Report CL Data Problem
Account Detail
Standard Buttons
Edit
Change Owner
Change Record Type
Send Survey
Delete
View Account Hierarchy
Sharing (SU Only)
Sharing Hierarchy (SU Only)
Include Offline
Get Survey Invitation
Check for New Data
View Partner Scorecard
Add to Call List
Printable View
Link a Slack Channel
Custom Buttons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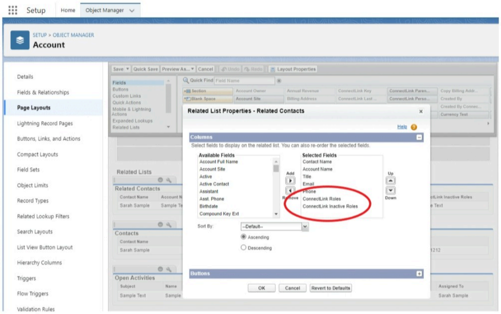
ConnectLink Paren...
ConnectLink Paren...
ConnectLink Perso...
ConnectLink Status
ConnectLink Up To...
Copy Billing Addr...
Created By
Created By Connec...
Currency Test
News
Twitter
Related Lists
Related Contacts
New
Merge Contacts
Add to Campaign
Add Relationship

Contact Name	Account Name	Title	Email	Phone	ConnectLink Roles	ConnectLink Inactive Roles
Sarah Sample	Sample Text	Sample Text	sarah.sample@company.com	1-415-555-1212	Sample Text	Sample Text

7. Add Related Contacts to the Account layout to see the positions that the contacts associated with the Account have, you need to add the related list to your layout and add the ConnectLink Roles/ConnectLink Inactive Roles fields to the list.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Validation Rules
Related Lists
Related Contacts
Contacts
Open Activities
Help
Add
Remove
Up
Down
OK
Cancel
Revert to Defaults

Related List Properties - Related Contacts

Columns

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields	Selected Fields
Account Full Name	Contact Name
Account Site	Account Name
Active	Title
Active Contact	Email
Assistant	Phone
Asst. Phone	ConnectLink Roles
Birthdate	ConnectLink Inactive Roles
Compound Key Ext	

Sort By: --Default--

● Ascending

○ Descending

Buttons

8. Repeat this process, adding Related Accounts to the contact layout.
9. You will need to ensure your license for Salesforce allows for the amount of data licensed from Agile. Use this formula as a guideline on how much storage is required.
   A = Number of Account
   C = Number of Contacts
   O = Number of Objects

A + C = O

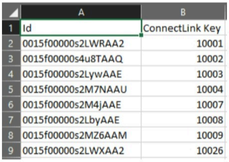
O x 2 KB = Number of KB needed to accommodate the new data

Example:
10,000 Account; 25,000 Contacts
10,000 + 25,000 = 35,000 Objects

35,000 x 2 KB = 70,000 KB

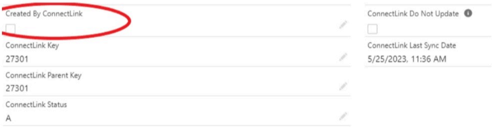
70 MB Required

Note: The application will only import a portion of the additional data if there is insufficient storage available.



	A	B
1	Id	ConnectLink Key
2	0015f00000s2LWRAA2	10001
3	0015f00000s4u8TAAQ	10002
4	0015f00000s2LywAAE	10003
5	0015f00000s2M7NAAU	10004
6	0015f00000s2M4jAAE	10007
7	0015f00000s2LbyAAE	10008
8	0015f00000s2MZ6AAM	10009
9	0015f00000s2LWXAA2	10026

10. You can now load the data returned to you from the Agile data match into Salesforce. All you need to do is load the ConnectLink Key into your existing Account and Contacts, using your Salesforce ID as your identifier.
11. This is also a good time to import the file of missing institutions provided to you. These are institutions that you lease, but do not currently exist in your Salesforce org. **Note:** The Inst_UID in the file needs to be mapped to the ConnectLink Key in Salesforce.
12. Any accounts and contacts that are added to your Salesforce environment through ConnectLink are flagged as an Agile record by checking the Created by ConnectLink box. This helps you comply with the Agile purge requirements at the end of the contract term if you choose not to continue with your data license. Please refer to your contract terms and conditions for more information.



Created By ConnectLink
☐

ConnectLink Key
27301

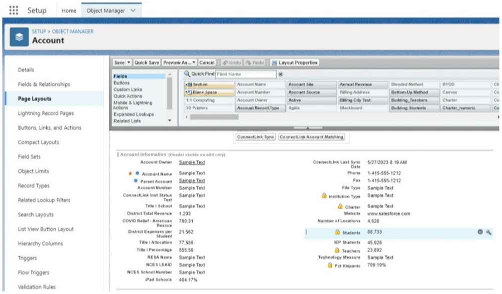
ConnectLink Parent Key
27301

ConnectLink Status
A

ConnectLink Do Not Update
☐

ConnectLink Last Sync Date
5/25/2023, 11:36 AM

13. Review the data fields you have received from Agile and add any custom fields to your Salesforce layout that you'd like to have displayed. Ensure that you are using the correct data type for the field, otherwise the application will produce an error. Use the Agile Data Dictionary to match the Agile data type with the Salesforce data type.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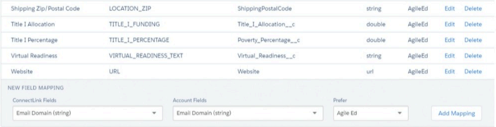
Related Lists
Quick Find
Field Name
Section
Blank Space
1:1 Computing
3D Printers
Account Name
Account Number
Account Owner
Account Record Type
Account Site
Account Source
Active
Agilix
Annual Revenue
Billing Address
Billing City Test
Blackboard
Blended Method
Bottom-Up Method
Building_Teachers
Building Students
BYOD
Canvas
Charter
Charter_numeric
ConnectLink Sync
ConnectLink Account Matching

Account Information (Header visible on edit only)

Account Owner: Sample Text
Account Name: Sample Text
Parent Account: Sample Text
Account Number: Sample Text
ConnectLink Inst Status Text: Sample Text
Title I School: Sample Text
District Total Revenue: 1,203
COVID Relief - American Rescue: 780.31
District Expenses per Student: 21,562
Title I Allocation: 77,586
Title I Percentage: 855.56
RESA Name: Sample Text
NCES LEAID: Sample Text
NCES School Number: Sample Text
iPad Schools: 404.17%
ConnectLink Last Sync Date: 5/27/2023 8:19 AM
Phone: 1-415-555-1212
Fax: 1-415-555-1212
File Type: Sample Text
Institution Type: Sample Text
Charter: Sample Text
Website: www.salesforce.com
Number of Locations: 4,628
Students: 88,733
IEP Students: 45,926
Teachers: 23,892
Technology Measure: Sample Text
Pct Hispanic: 799.19%

14. At this point, you'll need to perform the field mappings in the ConnectLink Setup. When the preference is set to "Agile Ed" or "Choose Agile Ed" the Agile data is preferred over the current information in Salesforce. For individual account or contact updates, the "Choose" option allows the individual user to select from the two options and determine whether to overwrite the existing Salesforce data with the Agile data. For bulk updates the "Choose" option is ignored. For "Salesforce" and "Choose Salesforce" the Agile data is used only to fill empty fields. The "Choose" option is only available for single record updates.

Note: A single Agile data select can be mapped to more than one Salesforce field. For example, some clients choose to map the Agile email address to the standard Salesforce email field with the preference set to Salesforce and will again map the Agile email address to a secondary Salesforce email field with the preference set to AgileEd.

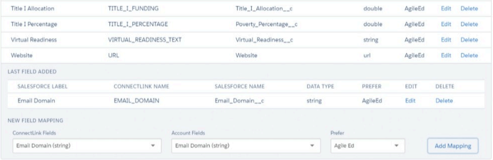


Shipping Zip/Postal Code	LOCATION_ZIP	ShippingPostalCode	string	AgileEd	Edit	Delete
Title I Allocation	TITLE_I_FUNDING	Title_I_Allocation__c	double	AgileEd	Edit	Delete
Title I Percentage	TITLE_I_PERCENTAGE	Poverty_Percentage__c	double	AgileEd	Edit	Delete
Virtual Readiness	VIRTUAL_READINESS_TEXT	Virtual_Readiness__c	string	AgileEd	Edit	Delete
Website	URL	Website	url	AgileEd	Edit	Delete

NEW FIELD MAPPING

ConnectLink Fields: Email Domain (string)
Account Fields: Email Domain (string)
Prefer: Agile Ed

Add Mapping



Title I Allocation	TITLE_I_FUNDING	Title_I_Allocation__c	double	AgileEd	Edit	Delete
Title I Percentage	TITLE_I_PERCENTAGE	Poverty_Percentage__c	double	AgileEd	Edit	Delete
Virtual Readiness	VIRTUAL_READINESS_TEXT	Virtual_Readiness__c	string	AgileEd	Edit	Delete
Website	URL	Website	url	AgileEd	Edit	Delete

LAST FIELD ADDED

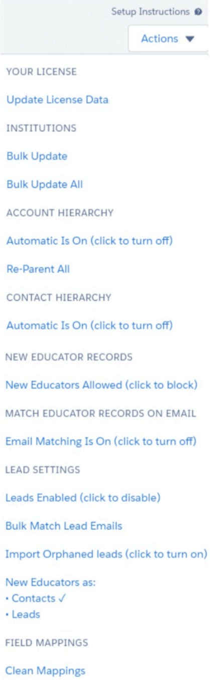
SALESFORCE LABEL	CONNECTLINK NAME	SALESFORCE NAME	DATA TYPE	PREFER	EDIT	DELETE
Email Domain	EMAIL_DOMAIN	Email_Domain__c	string	AgileEd	Edit	Delete

NEW FIELD MAPPING

ConnectLink Fields: Email Domain (string)
Account Fields: Email Domain (string)
Prefer: Agile Ed

Add Mapping

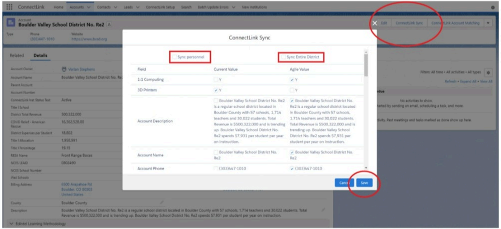
15. After creating your field mappings, use the Actions menu to configure your data flow.


Setup Instructions
Actions

YOUR LICENSE
Update License Data
INSTITUTIONS
Bulk Update
Bulk Update All
ACCOUNT HIERARCHY
Automatic Is On (click to turn off)
Re-Parent All
CONTACT HIERARCHY
Automatic Is On (click to turn off)
NEW EDUCATOR RECORDS
New Educators Allowed (click to block)
MATCH EDUCATOR RECORDS ON EMAIL
Email Matching Is On (click to turn off)
LEAD SETTINGS
Leads Enabled (click to disable)
Bulk Match Lead Emails
Import Orphaned leads (click to turn on)
New Educators as:
• Contacts ✓
• Leads
FIELD MAPPINGS
Clean Mappings

- **Account Hierarchy:** Determines whether the integration will update the native account hierarchy.
- **Contact Hierarchy:** Determines whether the integration will update the primary relationship of the contact.
- **New Educator Records:** Determines whether new contacts are imported with updates or if only existing contacts get updated.
- **Match Educator Records on Email:** Allows the application to match contact or lead records where a ConnectLink Key is not present and append the key. **Note:** The standard contact/lead email fields need to be mapped in order for this setting to work. Preference can be set to Salesforce.
- **Enable Leads:** Enables the sync(s) to update leads as well as allow for new educator records to be created as leads.
- **Bulk Match Lead Emails:** Goes over all existing leads that do not have agile keys and attempts to set a key to them via an exact match on email.
- **Import Orphaned Leads:** Batch job that imports leads that do not belong to any accounts that are currently in the system (will not create accounts, will create leads with no account attached).
- **Import New Educators as:** Determine whether the app imports educators as Leads or Contacts.

16. After you have mapped all fields and configured your settings, you are able to update your Salesforce CRM from Agile's database by clicking on the "ConnectLink Sync" button for individual account. Update an individual account in Salesforce using the ConnectLink Sync button to ensure that your mapped fields display properly, and the update occurs without error.



ConnectLink Sync

☐ Sync personnel ☐ Sync Entire District

Field	Current Value	Agile Value
1:1 Computing	☐ Y	☑ Y
3D Printers	☑ Y	☐ Y
Account Description	☐ Boulder Valley School District No. Re2 is a regular school district located in Boulder County with 57 schools, 1,714 teachers and 30,022 students. Total Revenue is $500,322,000 and is trending up. Boulder Valley School District No. Re2 spends $7,931 per student per year on instruction.	☑ Boulder Valley School District No. Re2 is a regular school district located in Boulder County with 57 schools, 1,714 teachers and 30,022 students. Total Revenue is $500,322,000 and is trending up. Boulder Valley School District No. Re2 spends $7,931 per student per year on instruction.
Account Name	☐ Boulder Valley School District No. Re2	☑ Boulder Valley School District No. Re2
Account Phone	☐ (303)447-1010	☑ (303)447-1010

ConnectLink
Home
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Contacts
Leads
ConnectLink Setup
Search
Batch Update Errors
New Institutions
Account
Boulder Valley School District No. Re2
Edit
ConnectLink Sync
ConnectLink Account Matching
Related
Details
Cancel
Save

17. Congratulations, you have completed the setup for your ConnectLink integration. Click "Bulk Update All" to force update all records with the mapped data. Then schedule ongoing weekly Bulk Updates. See the [Scheduling Bulk Updates]() page for instructions.