



Installation Guide

Shortify.ing - Salesforce Native URL Shortener

<https://shortify.ing>



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1. USEFUL LINKS

1.1. Installation Guide [Youtube](#) Video

1.2. Shortify.ing [User Guide](#) PDF

1.3. Salesforce [AppExchange](#) listing of Shortify.ing

2. PACKAGE INSTALLATION

2.1. Install Shortify.ing

- I. Go to the Salesforce Appexchange using the following URL and click on the Get It Now button.
<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N4V00000DYIP9UAP>
- II. After the **Get It Now** button clicks, it will ask for Salesforce login details. Use your Salesforce credentials in which you would like to install **Shortify**.
- III. By default, it'll install only for System administrators, but you can change into another option or can be assigned to other users in the future at any time. We recommended installing "**Install for Admin Only**" and adding other users according to your requirement. Adding any new user to use this solution is very simple.
- IV. Now click on the **Installed button** and wait for 1 to 2 minutes to install. Sometimes it may take more time than expected. If it is taking time, then click on the done button and wait for the installation confirmation email from **Salesforce**.

2.2. Verify Installation

- I. After getting the confirmation email to verify the package on the Installed Packages setting of Salesforces. Current major version is v1.4 so you should see v1.4.x where x can be any positive number i.e. 1, 2, 3, ...
- II. Congratulations, you have just completed the installation process. Now you need to follow a configuration process that takes less than 10 minutes.

3. SALESFORCE ORG CONFIGURATION

1. Create a new site or Edit existing Salesforce Site

This solution can be used by any existing Salesforce Site which does not have **URL Rewriter** preconfigured. If you do not have an existing Salesforce Site then create a new one.

- I. Search for **Site** text and Clicks on **New button**.
- II. **Site Label** – Shortify.ing URL Shortener
- III. **Active Site Home Page - cfsu.Home** (If you have any other page then leave it)
- IV. **URL Rewriter Class - cfsu.DefaultURLRewriter** (This is required for application. If you are using any existing Site with already defined URL Rewriter class, then create a new site. You cannot use this solution with already defined URL Rewriter)
- V. Other settings change depending on your requirements.
- VI. Clicks on Save button

2. Configure Salesforce Site for Shortify

- I. Whitelist **Shortify.ing** URL Shortener specific Salesforce **VisualForce** pages –
- II. Go to the **Site Details Page**
- III. Clicks on the **Edit Button** of **Site Visualforce Pages**
- IV. Select **cfsu.R** and **cfsu.Error** page and clicks on the Add button
- V. Activate Salesforce Site

4. SHORTIFY.ING APPLICATION CONFIGURATION

Click on the **App Launcher** Icon and search for “**Shortify.ing**”. Then, click on the **CustomerFoster Logo**. Before starting configuration, please note down the **Salesforce Site URL**. You will need this during the configuration process.

4.1. Configuration Tab

Click on the Configuration tab. This page contains all configuration settings required to use Shortify.ing Solution.

I. **Base URL:** This is the prefix url appended with each short URL generated by Shortify.ing solution.

- a. Click on the **Pencil icon** of **Base URL**
- b. Read the warning message and again clicks on the **Pencil Icon**
- c. Popup will come
- d. We support 3 types of domain name mapping for Shortify

- i. Use Salesforce Site/Community URLs
- ii. Use Shortify domains available on popup
- iii. Use your own custom domain

e. For Salesforce Site/Community URL

- i. Select Site/Community Configured for Shortify
- ii. Click on the **Save** button.

f. For Shortify domains

- i. Select Site/Community Configured for Shortify
- ii. Select Shortify domain from the drop down list.
- iii. Clicks on the **Save** button.

g. For your own custom domains

- i. Select Site/Community configured for Shortify
- ii. Clicks on **Your Branded Custom Domain** button.
- iii. Put your custom domain in the text box. Make sure URL end with “/”
- iv. Click on the Submit Request button.

II. **Org Wide Email:** This org wide email is used by Shortify.ing to send emails to users. Make sure to select a verified Org Wide Email address.

4.2. Business Unit Tab

- I. Click on the Department tab.
- II. If you don't see any Business Unit created by installation flow, then change list view as **All**.
- III. Click on the **CFSU Marketing** Business Unit list item and go to the Business Unit details page.
- IV. Click on the **+ icon** of the member panel (If you are unable to see + icon then you do not have Manage User permission.). This will open a popup with a user list.
- V. Now check the **Checkboxes** of users to whom you like to allow to use the **Shortify.ing URL Shortener Solution**. To use this solution, the user must be part of any Business Unit. A user cannot be a member of more than one Business Unit.

5. CONTACT CUSTOMER FOSTER SUPPORT

Click on the right bottom link "Contact Customer Foster". Fill in the subject and message block and try to provide as much detail as possible so that we can get back at the earliest.

