

RunGopher (Salesforce Cloud) App – Installation and Configuration Guide

This guide takes you through the process of installing and configuring the RunGopher (Salesforce Cloud) app.

1. Once logged into your Salesforce account, click on the link below to install the app:
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t7F0000054o5l>
2. After installation is complete, you need to create a named credential by the name 'RG_API'.

Choose 'Named Principal' as the Identity Type, and 'Password Authentication' as the Authentication Protocol. The URL should be set to 'https://portal.rungopher.com/api/'. Type 'x' as the user name and the RunGopher account API key as the password.

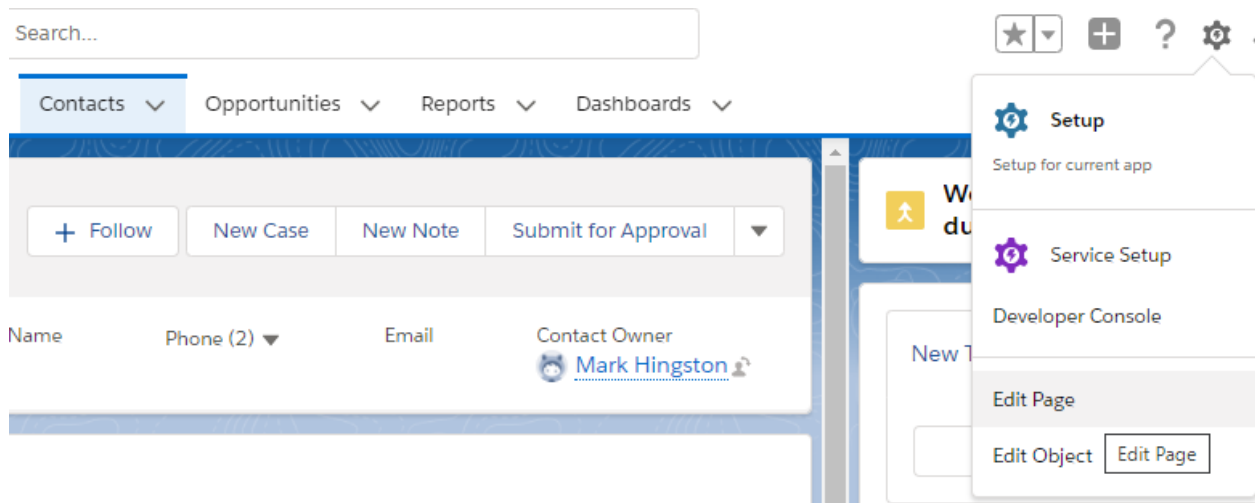
The screenshot shows the 'Named Credentials Edit: RG_API' page in Salesforce. At the top, there is a 'SETUP' link and a shield icon. Below this, the title 'Named Credentials' is displayed. The main heading is 'Named Credential Edit: RG_API'. A subtitle reads: 'Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to t'. There are 'Save' and 'Cancel' buttons at the top right of the form area. The form contains several fields: 'Label' with the value 'RG_API', 'Name' with the value 'RG_API', and 'URL' with the value 'https://portal.rungopher.com/api/'. Below these is a section titled 'Authentication' with a dropdown arrow. Inside this section, there is a 'Certificate' field with a search icon, an 'Identity Type' dropdown set to 'Named Principal', and an 'Authentication Protocol' dropdown set to 'Password Authentication'. At the bottom of the authentication section, there are 'Username' and 'Password' fields. The 'Username' field contains the character 'x', and the 'Password' field is masked with dots.

Field	Value
Label	RG_API
Name	RG_API
URL	https://portal.rungopher.com/api/
Authentication	
Certificate	
Identity Type	Named Principal
Authentication Protocol	Password Authentication
Username	x
Password	

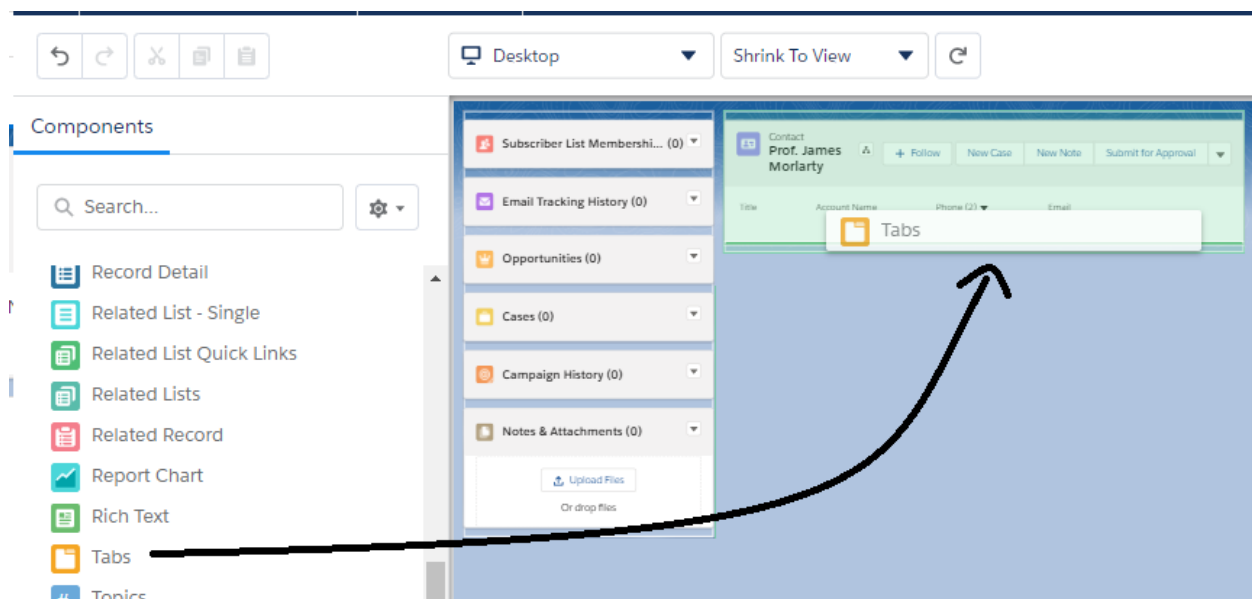
In the 'Callout Options' section immediately below, check the first two options:



- Next, you need to add the RunGopher UI component to your Contact and Lead pages. Go to any Contact within Salesforce, and click the 'Edit Page' link at the top right.



- Drag and drop a tab holder to the contact page (if you already have tab pages in your contact page, then skip this step).



5. Click 'Add Tab' on the right pane and add a new tab, and give it a custom name 'RunGopher'

The screenshot shows a 'Tab Label' dialog box on the left and a 'Details' tab header on the right. The dialog box has a 'Tab Label' dropdown menu with 'Custom' selected, a text input field for a custom label with 'RunGopher' entered, and a 'Done' button. The right pane shows a 'Details' tab with a close button, an 'Add Tab' button, a 'Set Component Visibility' section, and a 'Filters' section with an 'Add Filter' button.

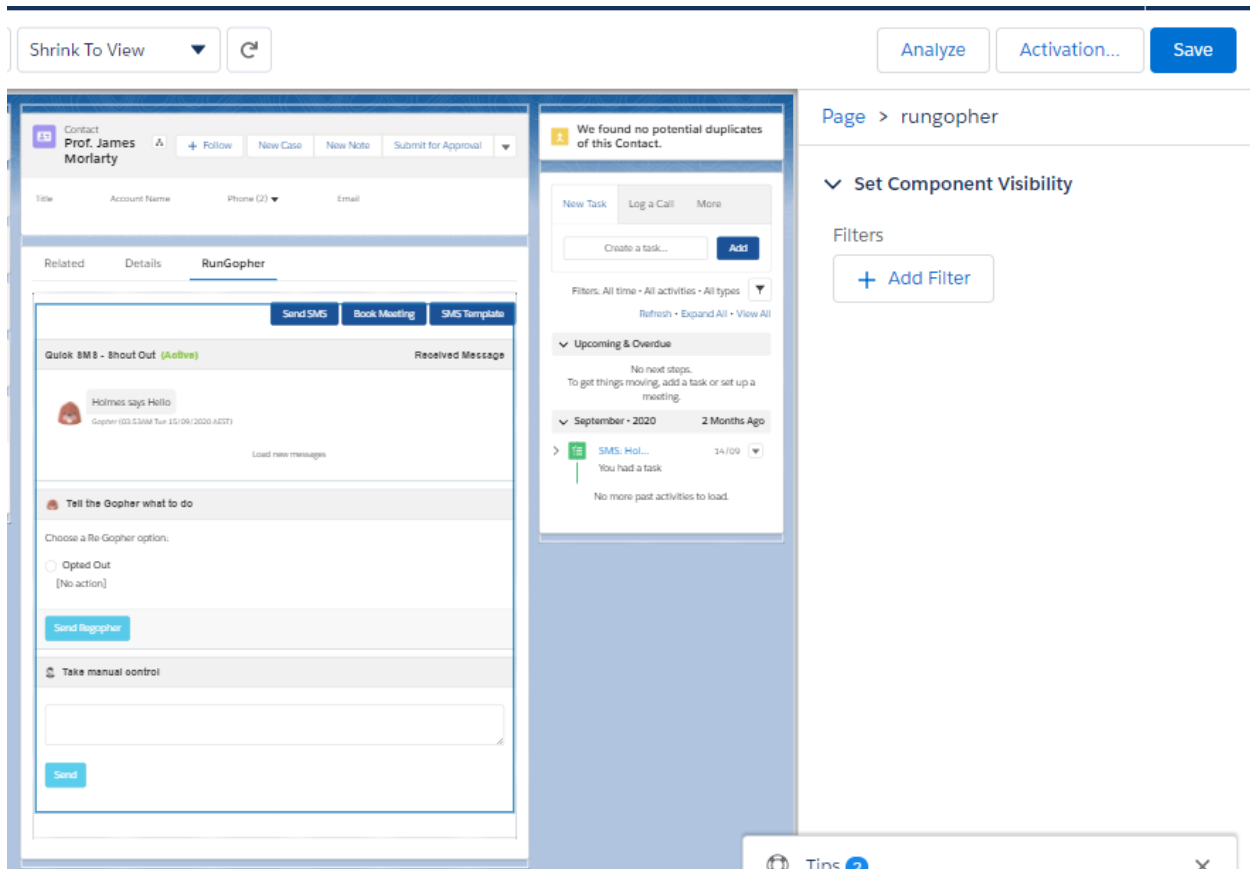
6. Click the new 'RunGopher' tab heading to navigate to that tab.

The screenshot shows the CRM interface for 'Contact Prof. James Moriarty'. The 'RunGopher' tab is selected in the tab bar. The main content area is empty, displaying 'Add Component(s) Here'. The top navigation bar includes buttons for '+ Follow', 'New Case', 'New Note', and 'Submit for Approval'.

7. Drag and drop the new custom component named 'runggopher' from the list on the left to the new tab (not 'runggopherLead'!).

The screenshot shows the Lightning App Builder interface. The top navigation bar includes a back arrow, 'Lightning App Builder', 'Pages', and 'Contact Record Page'. Below the navigation bar are icons for undo, redo, delete, and a 'Desktop' view selector. The left sidebar, titled 'Components', contains a search bar and a list of component categories: 'Standard' (with icons for Leads, Topics, Trending Topics, Twitter, and Visualforce) and 'Custom' (with 'Custom (0)' showing 'No components available.' and 'Custom - Managed (3)' listing 'Email Activity and Journeys', 'runggopher', and 'Transactional Emails (Tasks)'). The main canvas displays a 'Contact Record Page' layout for 'Prof. James Moriarty'. It features a 'Subscriber List Membershi...' dropdown, 'Email Tracking History (0)', 'Opportunities (0)', 'Cases (0)', 'Campaign History (0)', and 'Notes & Attachments (0)' sections. A 'RunGopher' tab is visible in the 'Related' section. A black arrow originates from the 'runggopher' component in the 'Custom - Managed' list and points to a new tab in the 'RunGopher' section of the layout.

8. The component will be displayed as follows. Hit 'Save' on top right to save, and exit the builder by clicking the 'Back' button on top left.



Now, do the same for the Lead page (repeat steps 1 - 8). In step 7, make sure to drag the 'rungopherLead' component (instead of 'rungopher').

Congratulations, now you're ready to use the RunGopher (Salesforce Cloud) app!

If you haven't yet granted your RunGopher account permission to access your Salesforce instance, please do so now; for details, pls look at <https://rungopher.zendesk.com/hc/en-us/articles/360001080835-Connecting-Salesforce-and-RunGopher>.