

How to Install the Salesforce Package

Brief Overview

If you plan to segment your WalkMe content for different categories of end-users using sfVars, be sure to download the Salesforce package.

Once you've downloaded the package, please provide your Salesforce Admin with Editor access so that he/she can configure the package. The following permission sets should be granted to use the WalkMe segmentation feature and the WalkMe Call-To-Action banner:

- **WalkMe End User Permissions** - This permission set should be granted to any user that needs to use WalkMe and users that are consuming WalkMe services within your organization. It will expose Salesforce data about the users, such as what the Salesforce Role and Profile of the users are, in order to use the WalkMe segmentation feature.
- **WalkMe Admin Package Permissions** - This permission should be granted to your Salesforce Admin or the person that configures and defines WalkMe for other users. It provides access to set the Call-To-Action banner definitions.

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- Take the [WalkMe for Salesforce](#) course in the DAI.
- Don't have a DAI account yet? [Sign up here.](#)

Step-By-Step Instructions

The latest version is 2.84.

1. Download the Salesforce Installation Package for your [Test](#) and [Production](#) Environment
2. Log in to Salesforce with your administrator account
3. Select which users can access the WalkMe Setup Page. It is recommended to grant access to all users
4. Click Install

Configuring the package after installation

In your Salesforce Apps menu you will find "WalkMe Setup". In most cases no further configuration

is required, however here is an overview of the options:

- **WalkMe Setup:** Deprecated
- **WalkMe Extension Configuration:** Configures the download URL for the “Install WalkMe extension” tile that can be placed on users’ home screens. Not required if the WalkMe extension is mass deployed by IT
- **Advanced:** Deprecated

Please Note:

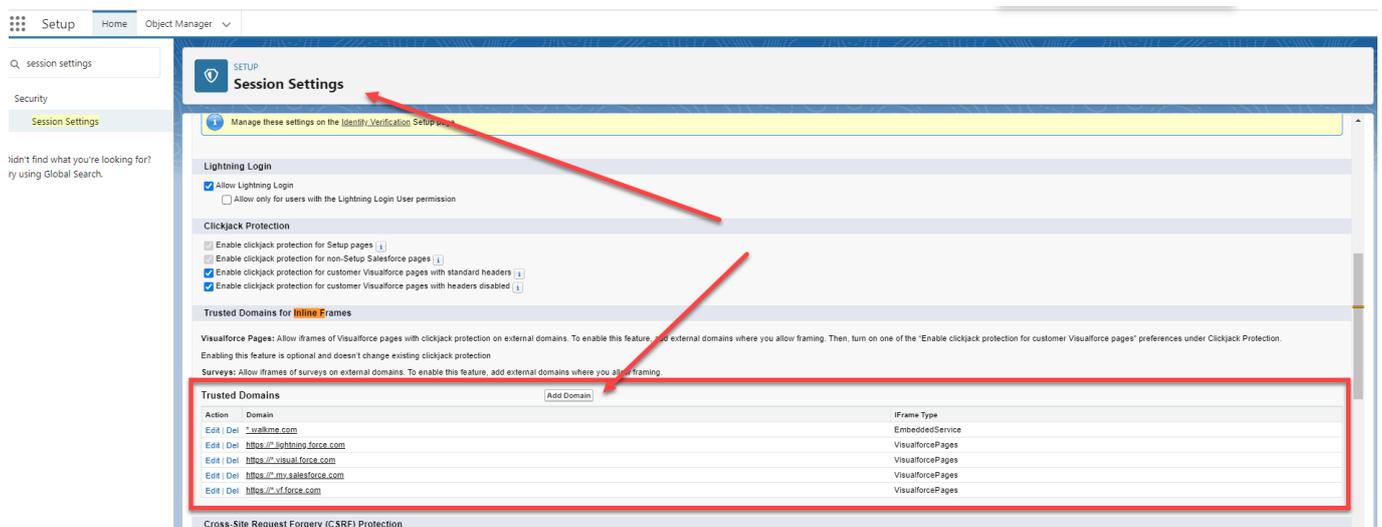
The sfVars Visual Force page (vf_WalkMeSfVars) will need to be available for all profiles that need to access WalkMe and the variables. Additionally, for sfVars to be properly retrieved in Lightning, the setting that is accessed via Setup > Session Settings > Clickjack Protection that reads “Enable clickjack protection for customer Visualforce pages with headers disabled” needs to stay unchecked, which is its default.

Need to enable both Clickjack protection **and** sfvars?

Your Salesforce admin can add the below domains to your Salesforce instances “Trusted Domains for Inline Frames” list” in **Setup > Security > Session Settings:**

- https://*.lightning.force.com
- https://*.visual.force.com
- https://*.my.salesforce.com
- https://*.visualforce.com
- https://*.vf.force.com

After adding those sites, you will have the clickjack checkbox and still be able to pull sfvars.



Video Tutorial

If you wish to see the above steps in action, please watch this instructional video.

