# Install WalkMe for Salesforce Lightning

## Let's Get WalkMe to Your Lightning Users!

WalkMe is made available to your Salesforce Lightning users via a [browser extension](). We recommend pushing out the extension via a Mass Installation. Alternatively, you can ask users to download the extension themselves (Manual Installation). Once complete, your published WalkMe content will immediately be accessible and WalkMe will begin collecting data.

Please note:

Lightning Connectors are no longer required for WalkMe to work correctly with  Salesforce Lightning

## Deploy the WalkMe Extension via Mass Installation

The recommended method of deployment is mass installation of the browser extension for all your Salesforce users. Mass Installation means users don't need to do anything themselves which saves time, reduces troubleshooting, and ensures they start seeing WalkMe right away. [Read more about the Mass Installation project scope.]()

More information about Mass Installation

Your Account Manager will provide you with a link to the Deployment Guide which will guide you through installing, enabling, and configuring the WalkMe Extension. This process will need to be repeated for each OS and browser on which you would like to deploy WalkMe. The mass installation should be performed by your IT Team or System Admin.

# Deploy the WalkMe Extension via Manual Installation

Not able to push out a mass installation? Provide users with a link to individually download the extension for themselves. There are two recommended options for providing users with this link.

A. Send users an email

Your Account Manager will provide you with a link to download the WalkMe extension. Just send an email to your users with a link – [here is a template email we've created for you](#)! The email template includes easy, step-by-step directions for your users to download the extension in just a couple of minutes. This email can be sent by anyone in your organization.

B. Create an Activate Now banner in Salesforce

If you think personnel may disregard an email, you can add a call-to-action banner on Salesforce that will enable your users to download WalkMe with just one click. Adding this button will have to be performed by your Salesforce Admin.

Download the Package for your Test and Production environments. Learn how [here](here).

Then configure the banner to appear in Salesforce:

1. Click the cube in the Salesforce Navigation menu
2. Click WalkMe Extension Configuration
3. Enter Customer Name, Extension GUID, and Extension Profile (provided by your Account Manager)
4. Click Submit

Choose which pages the sidebar will appear on:

1. Go to the Page on which you'd like the banner to appear
2. Hover over the Settings gear. A menu will appear
3. Click Edit Page

4. Expand Custom – Managed folder in the left-hand navigation. NOTE: If you are unable to see the Custom – Managed folder follow the directs on-screen to
deploy your domain
5. Click and drag Walk-Me_Install_Call_To_Action to your preferred location on the page
6. Click Save
7. Click Activate

Now the banner will appear to your users and they can click Activate Now to download the extension! If you would like a custom image to display instead of the default one provided, talk to your Account Manager.
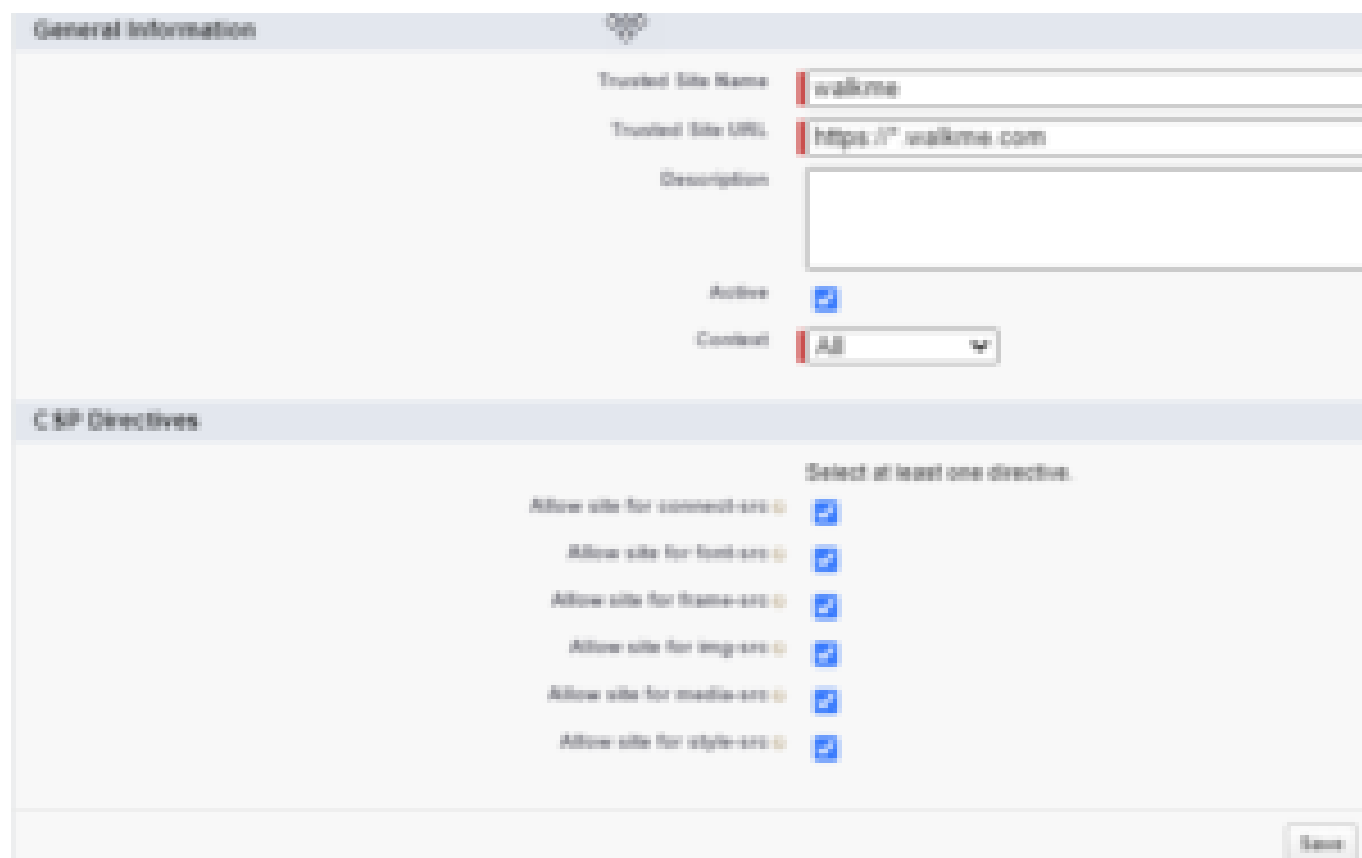
# Add Trusted Sites

Directions for Adding WalkMe as a Trusted Site in Salesforce Lightning

1. On Salesforce – Add the WalkMe domain to trusted sites
    1. From Setup, enter CSP in the `Quick Find` box, then select **CSP Trusted Sites**.
    2. Select **New Trusted Site**.
    3. Name the Trusted Site.
    4. Enter the URL for the Trusted Site
        1. We recommend adding:
            1. https://*.walkme.com
            2. [s3.walkmeusercontent.com](s3.walkmeusercontent.com)
    5. Select the Context for this trusted site to control the scope of the approval
        1. **All (Default):** CSP header is approved for both the organization's Lightning and Lightning Communities experience**
        2. **LEX**: CSP header is approved only for the organization's Lightning Experience
        3. **Communities**: CSP Header is only approved for the organization's Lightning Communities
    6. Here are the resources Lightning components can load from this site.  We recommend selecting all the resources.

| SETTING | DESCRIPTION |
|---|---|
| Allowlist site for `connect-src` | Allow Lightning components to load URLs using script interfaces from this site. |
| Allowlist site for `font-src` | Allow Lightning components to load fonts from this site. |
| Allowlist site for `frame-src` | Allow Lightning components to load resources contained in `<iframe>` elements from this site. |

| SETTING | DESCRIPTION |
|---------|-------------|
| Allowlist site for `img-src` | Allow Lightning components to load images from this site. |
| Allowlist site for `media-src` | Allow Lightning components to load audio and video from this site. |
| Allowlist site for `style-src` | Allow Lightning components to load style sheets from this site. |

7. Select **Save**.



# Enable Segmentation (Optional)

Download the Salesforce package if you plan on segmenting your WalkMe items for different users/user groups based on sfVars.

Directions for Enabling Segmentation

Configuring the package should be performed by your Salesforce Admin. Your Salesforce Admin will need access to the WalkMe Editor.

Follow the instructions below:

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