Installation and Setup

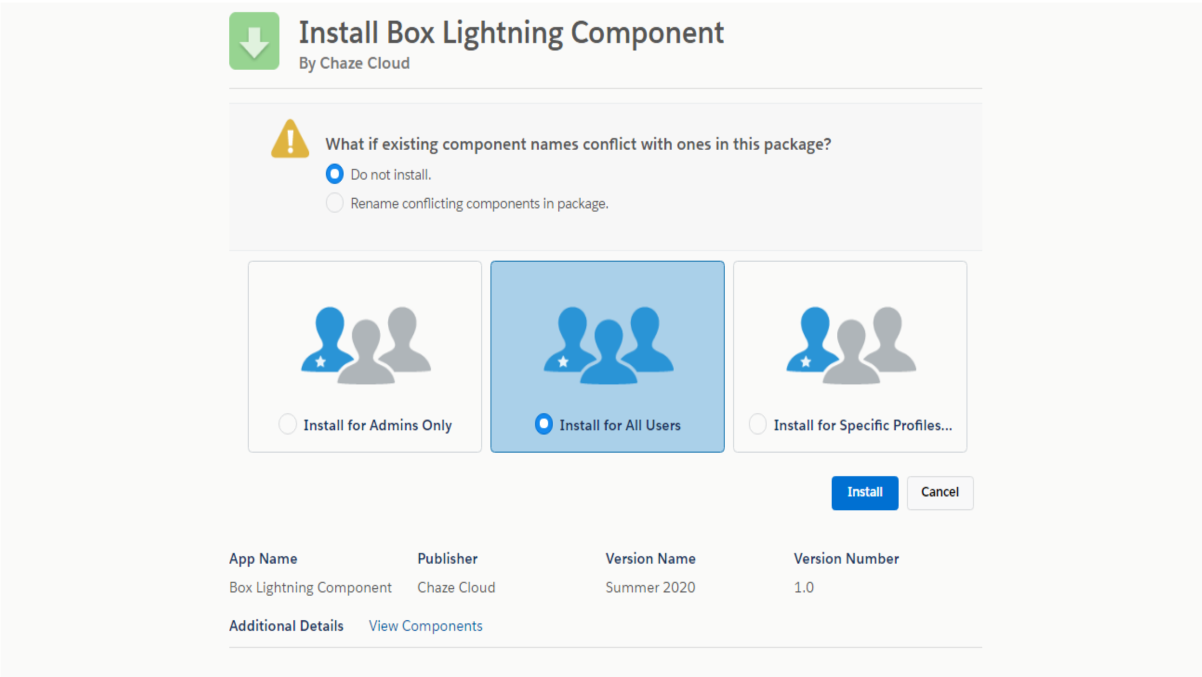
1. After purchasing the app on forceXchange you will be able to see two buttons “Install in Sandbox” and “Install in Production”. You can choose either of these two options. If you want to test this app first before using it in production environment, install it in Sandbox.

2. Go through the following steps to install the component in your Salesforce Org.

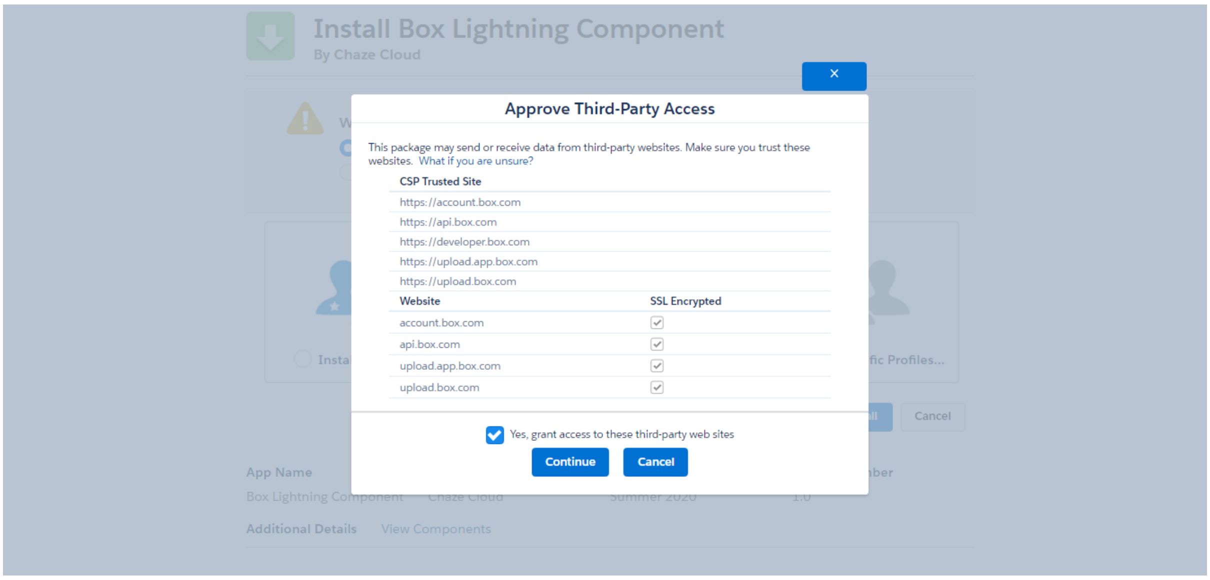
3. Click on either “Install in Sandbox” button or “Install in Production” button.

4. You may be asked to login with your Salesforce org credentials.

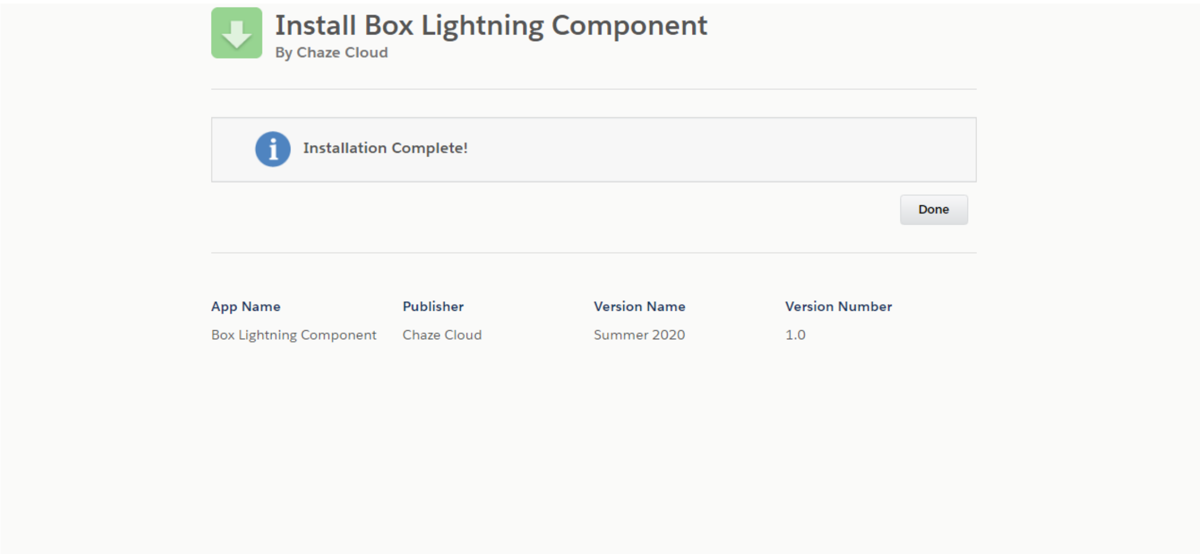
5. Select which type of users you want to install it for and click on the **Install** button to install the app.



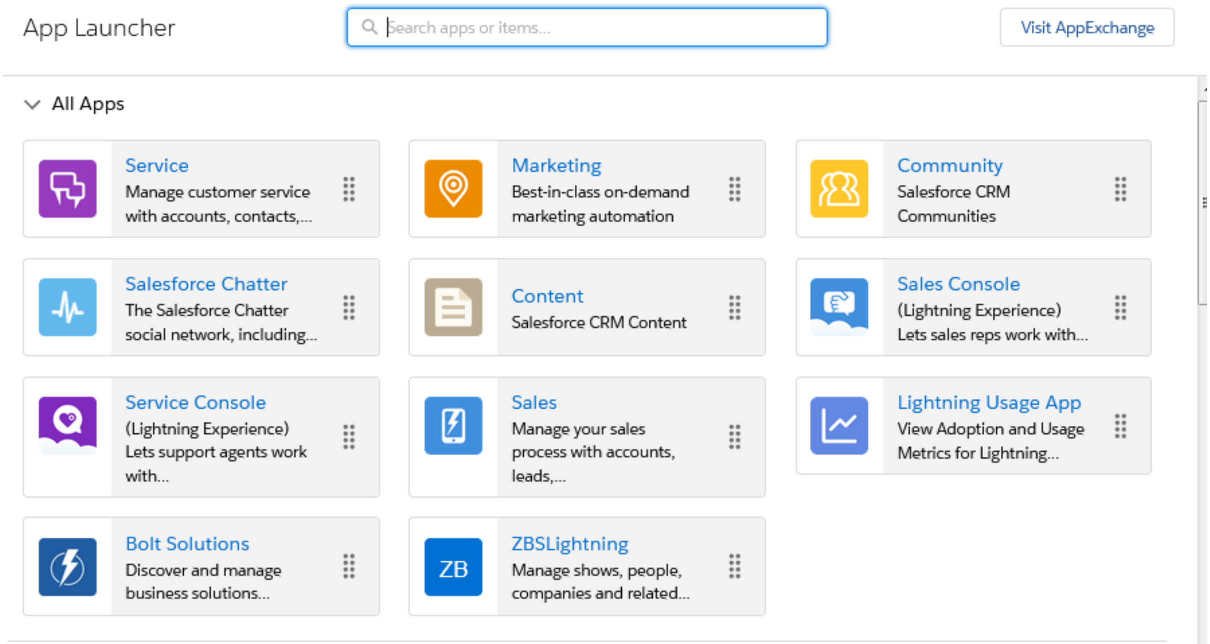
6. Approve the third-party access screen and click on continue.



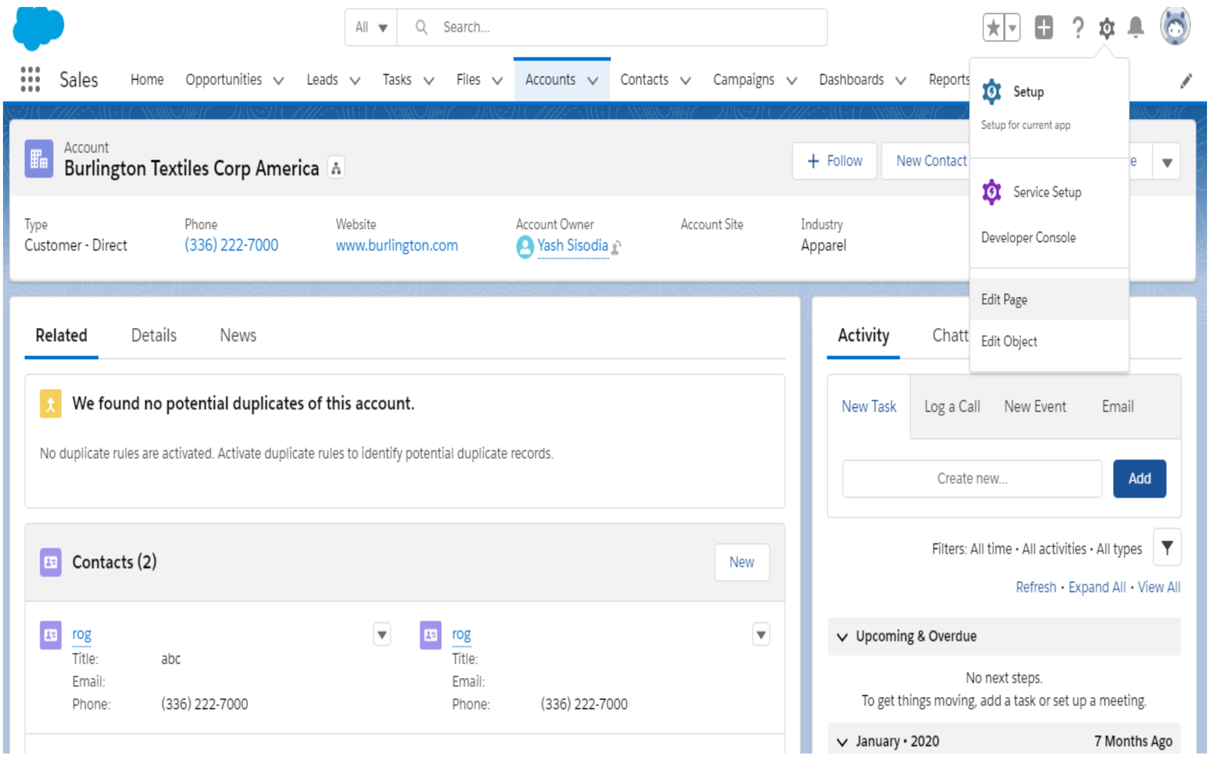
7. Wait until the Installation complete screen appears. Click the **Done** button.



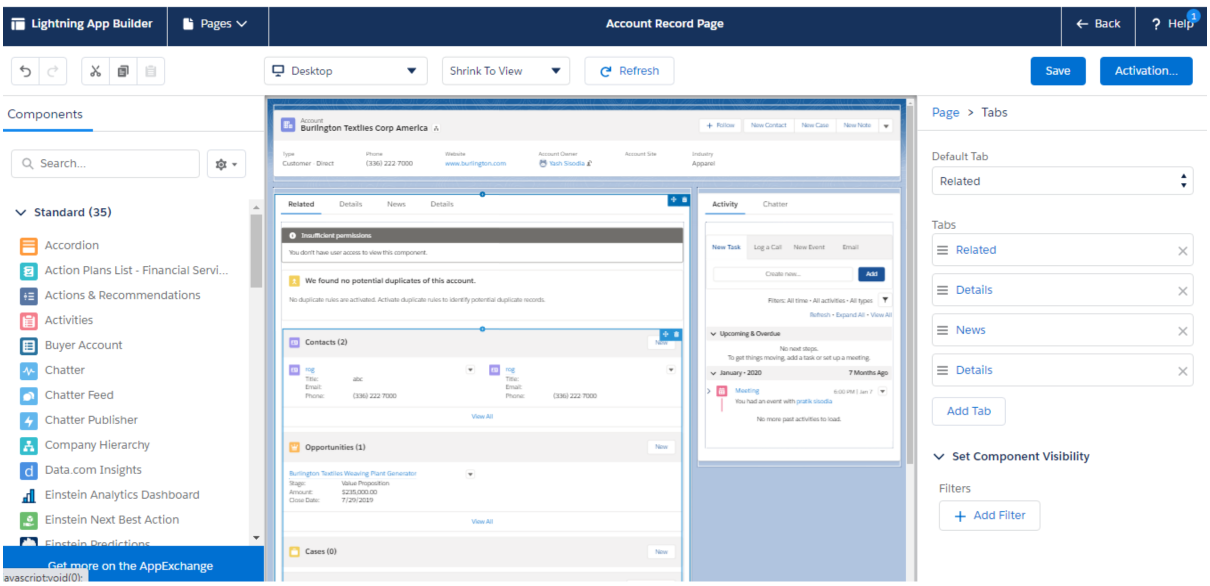
8. From Salesforce Lightning Experience App Launcher, select the **Sales App** to setup the app.



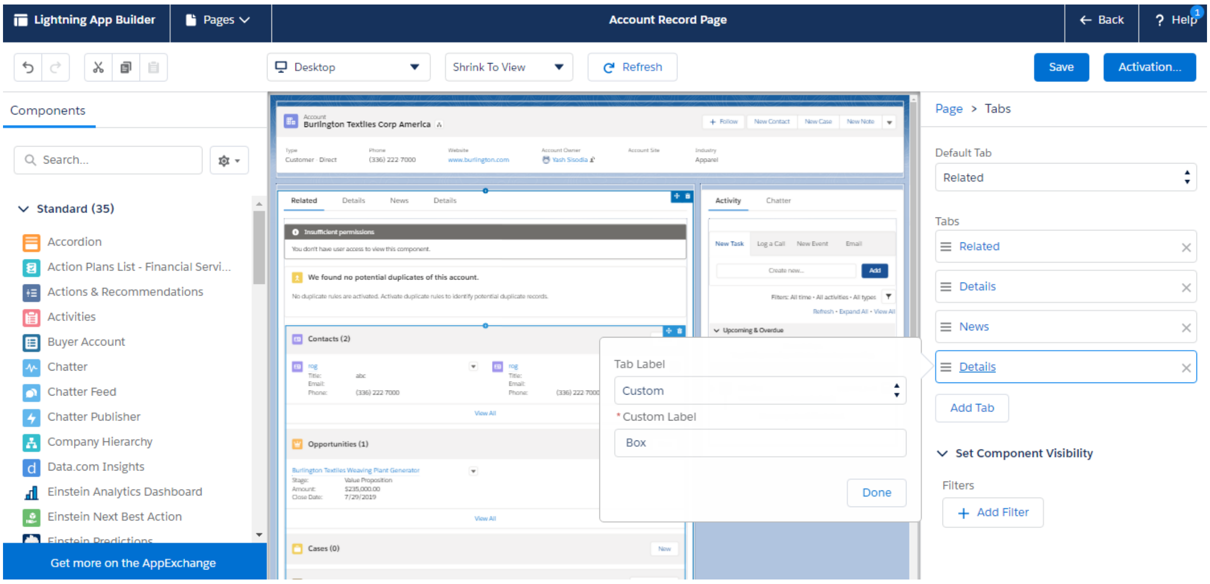
9. Now click on **Account** Tab and then click on any record. After record is open click on Setup icon and then click on Edit Page.



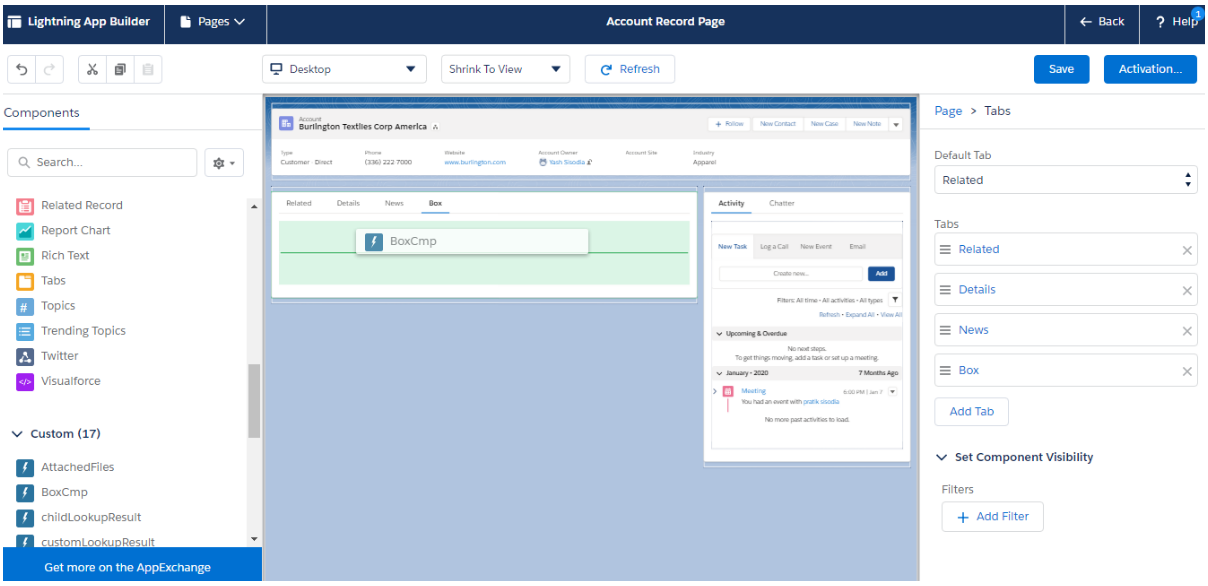
10. On Contact record page click on related or detail tab. On the right side click on **Add Tab** button, after this new tab will be created with **Details** name.



11. Click on details showing at the end of **Tabs** list, then from **Tab label** select **Custom.** A custom label text will appear type **Box** in custom label and click **Done**.

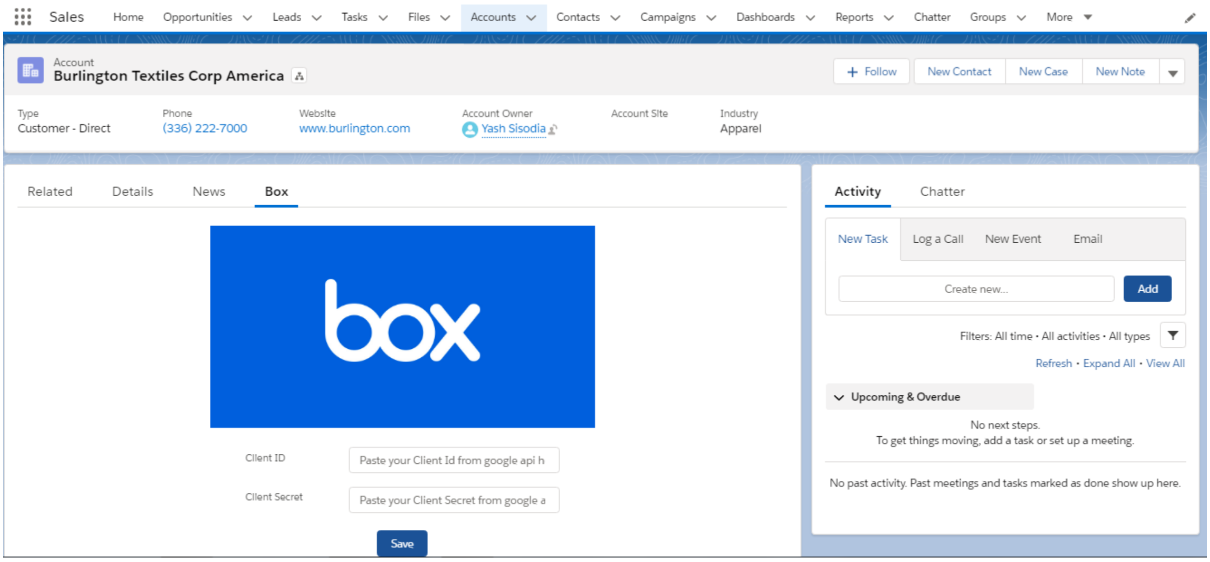


12. From the left side in the Components panel select and drag **BoxCmp** from **Custom** components and drop it on the Box tab. Click the **Save** button to save the page layout changes. Click the **Activation** button to deploy these changes to your org.

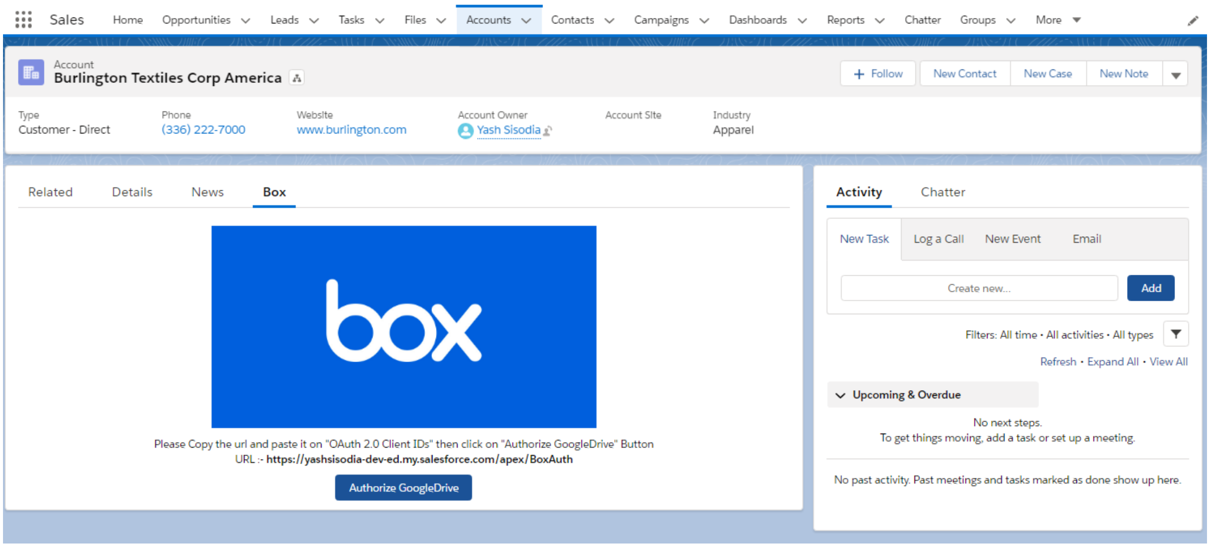


13. Congratulation you have successfully intalled the app on your Salesforce Org. By following step 7 – 12 you can add the component to any custom or standard object.

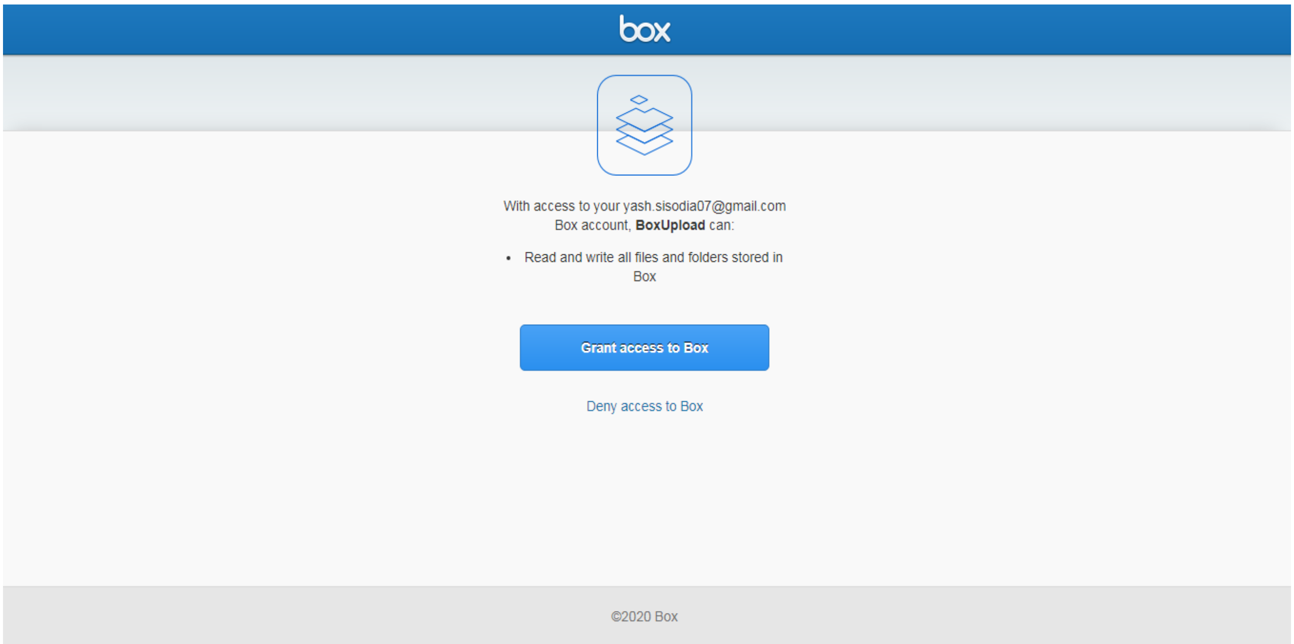
14. When you open the **Box** tab for the first time it will ask you to enter **Client Id** and **Client Secret**. Please refer to our demo video (URL=https://youtu.be/vZQsBK73VOo) it will guide you on how to get Client Id and Client Secret.



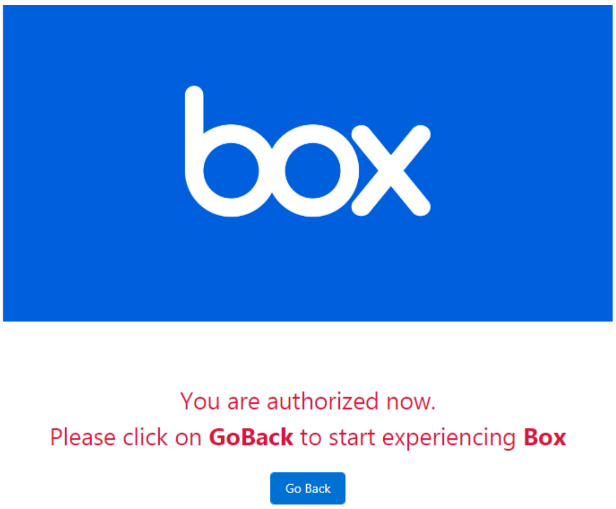
15. After clicking on the **Save** button a URL will be generated you have to paste this URL in your "OAuth 2.0 Redirect URI" in Box app console. Now click on the "**Authorise Box**" button.



16. A login screen will appear and the admin needs to login with Box account where the files are intended to be stored and click on "Grant access to Box".



17. After login, you will be automatically redirected to salesforce. The salesforce page will show the authorization success screen. Now click on the **Back** button.



18. You will be redirected to the lightning record page. Now you have successfully authorized your **Box** with salesforce. This authorization is required only one time. Now you can upload

files, create folders, prieview files, download files and delete files from salesforce to Box within the salesforce.