Application Installation Guide

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@salesforcedocs

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CHAPTER 1 What Is AppExchange?

AppExchange is a marketplace offering solutions, such as apps, components, and consulting services. To make your own solution publicly available to potential customers, you must be a Salesforce partner.

How Does AppExchange Work?

The creative power behind each AppExchange solution is a Salesforce partner. AppExchange gives partners a place to create and publish extensions to Salesforce. AppExchange is also the place for Salesforce admins to choose and install solutions that fit their org's needs. Here's how AppExchange works.

Create

A Salesforce partner initiates the process by creating an innovation that can improve a business process, such as a custom object, custom tab, or component. Partners share their customizations with other Salesforce users as a packaged AppExchange solution, whether an app, a Bolt solution, a Flow solution, Lightning data, or a component.

Publish

The Salesforce partner registers, packages, and publishes their solution on AppExchange. They can also create a demo of the functionality included in their solution for others to view before installing and include a trial version.

Install

Salesforce customers browse solutions published on AppExchange and choose which solutions to install in their orgs. Installing a published AppExchange solution is safe and simple. Customers can:

- **Browse**—View the descriptions, reviews, and demos of solutions on AppExchange. They choose the solution that fits their needs.
- **Test Drive**—Review a fully functional demo of the solution as a read-only user, and plan their implementation with their admins.
- **Install**—Add the solution and all its components to their Salesforce environment.
- **Deploy**—Immediately give their users access to the solution or customize it for a select group of users.

Who Can Use AppExchange?

Anyone can browse and test drive AppExchange listings. Salesforce admins and users with the Download AppExchange Packages permission can install AppExchange apps. To publish a listing on AppExchange, a user needs both Create AppExchange Packages and Upload AppExchange Packages permissions.

CHAPTER 2 Before Installing a Package

Before you begin, review AppExchange solutions, and determine how they fit into your current implementation of Salesforce.

Taking a Test Drive

A test drive is a new, fully functional Developer Edition Salesforce environment that contains the solution. Go to AppExchange, find a solution, and click Test Drive to try out the solution before you install it.

Verifying Requirements

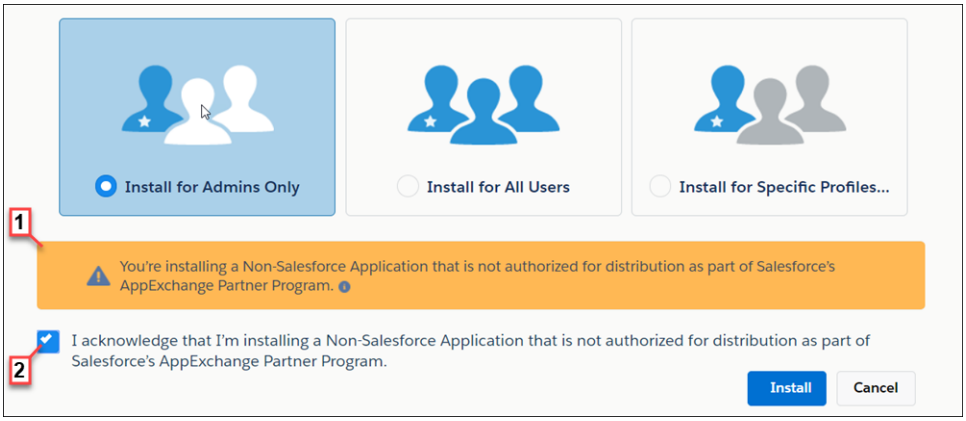
Every solution has its own requirements. To verify that a solution is compatible with your Salesforce org, review the Requirements section of the solution's Overview tab.

Determining If the Solution Supports Upgrades

To upgrade a solution, choose a managed package solution first. Unmanaged packages aren't upgradeable.

CHAPTER 3 Unauthorized Managed Packages

To participate in the AppExchange Partner Program, Salesforce's partners must meet certain standards and submit their AppExchange products for security review. When you install a managed package that the AppExchange Partner Program hasn't authorized for distribution, we notify you during installation.



The notification appears when you configure the package installation settings (1). Before you install the package, you must confirm that you understand that the package isn't authorized for distribution (2).

For information about the AppExchange Partner Program and its requirements, visit the Salesforce Partner Community. For information about non-Salesforce providers, see our Main Services Agreement.

CHAPTER 4 Installing Packages

Installing an AppExchange solution in your Salesforce org is straightforward. You install the solution as an unmanaged or managed package, and then you configure it for your environment and users.

Warning: If the solution is in a managed package, you can't change certain Salesforce components after you install them. Managed packages also have a namespace prefix that is prepended to all uniquely named components, such as custom fields. For more information on namespace prefixes, see Register a Namespace Prefix.

Only one person in your organization can install or upload a package at a time.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To install packages:
- Download AppExchange Packages

1. Go to AppExchange.
2. Browse or search for a solution.
3. Click **Get It Now** on the solution's listing page.

   If the listing doesn't have a **Get It Now** option, it's a partner app that you can download and use outside of Salesforce. For more information, contact the publisher.
4. Select your environment type: production or sandbox (test).
5. Enter any requested information, agree to the terms and conditions, and then click **Confirm and Install**.
6. Enter the requested information.
7. If the package is password-protected, enter the password you received from the publisher.
8. Review the package items, and click **Continue**.

   To install a new version of a managed package, review the list of new items included in the upgraded package.

   Note: Some package items, such as validation rules or record types, don't display in the Package Item list but are included in the package and install with the other items. If there are no items in the Package Items list, the package contains only minor changes not recorded in the Package Items list.
9. Review the API access that package components have been granted to ensure that they're acceptable and, if they are, click **Next**. If they aren't, click **Cancel**.

   For more information, see About API and Dynamic Apex Access in Packages in Salesforce Help.
10. When installing unmanaged packages, you can select `Resolve Naming Conflicts Automatically`.

    When this option is selected, Salesforce changes the name of the component in the package being installed.

11. In Enterprise, Unlimited, Performance, and Developer Editions, choose a security option, and click **Next**.

Install for Admins Only

Specifies the following settings on the installing administrator's profile and any profile with the Customize Application permission.

- Object permissions—Read, Create, Edit, Delete, View All, and Modify All enabled
- Field-level security—set to visible and editable for all fields
- Apex classes—enabled
- Visualforce pages—enabled
- App settings—enabled
- Tab settings—determined by the package creator
- Page layout settings—determined by the package creator
- Record Type settings—determined by the package creator

After installation, if you have Enterprise, Performance, Unlimited, or Developer Editions, set the appropriate user and object permissions on custom profiles as needed.

Install for All Users

Specifies the following settings on all internal custom profiles.

- Object permissions—Read, Create, Edit, and Delete enabled
- Field-level security—set to visible and editable for all fields
- Apex classes—enabled
- Visualforce pages—enabled
- App settings—enabled
- Tab settings—determined by the package creator
- Page layout settings—determined by the package creator
- Record Type settings—copied from admin profile

Note: The Customer Portal User, Customer Portal Manager, High Volume Customer Portal, Authenticated Website, Partner User, and standard profiles receive no access.

Install for Specific Profiles

Enables you to choose the usage access for all custom profiles in your organization. You can set each profile to have full access or no access for the new package and all its components.

- Full Access—Specifies the following settings for each profile.
  - Object permissions—Read, Create, Edit, Delete, View All, and Modify All enabled
  - Field-level security—set to visible and editable for all fields
  - Apex classes—enabled
  - Visualforce pages—enabled
  - App settings—enabled
  - Tab settings—determined by the package creator
  - Page layout settings—determined by the package creator
  - Record Type settings—determined by the package creator

- No Access—Specifies the same settings as Full Access, *except* all object permissions are disabled.

If the publisher included settings for custom profiles, other options are available. You can incorporate publisher's custom profile settings into your profiles without affecting your settings. Choose the name of the profile settings in the dropdown list next to the profile to which you want to apply them. The current settings in that profile remain intact.

Alternatively, to give this setting to all user profiles, click **Set All** next to an access level.

Note: Depending on the type of installation, it's possible this option doesn't appear. For example, in Group and Professional Editions, or if the package doesn't contain a custom object, Salesforce skips this option, which gives all users full access.

12. In Enterprise, Unlimited, Performance, and Developer Editions, if you chose **Select security settings**, select the level of access to give users in each profile, and click **Next**.

    Standard options are:

    - Full Access—Specifies the following settings for each profile.
      - Object permissions—Read, Create, Edit, Delete, View All, and Modify All enabled
      - Field-level security—set to visible and editable for all fields
      - Apex classes—enabled
      - Visualforce pages—enabled
      - App settings—enabled
      - Tab settings—determined by the package creator
      - Page layout settings—determined by the package creator
      - Record Type settings—determined by the package creator
    - No Access—Specifies the same settings as Full Access, *except* all object permissions are disabled.

    If the publisher included settings for custom profiles, other options are available. You can incorporate the publisher's custom profile settings into your profiles without affecting your settings. Choose the name of the profile settings in the dropdown list next to the profile to which you want to apply them. The current settings in that profile remain intact.

    Alternatively, to give this setting to all user profiles, click **Set All** next to an access level.

13. To install all the components in the package you selected, click **Install**.

    Note: During installation, Salesforce automatically resolves any references to package components from the source organization. For example, if a custom link in the package refers to a document, the Salesforce Help ID for the document is different after you install it. Salesforce automatically alters the installed custom link to refer to the new ID in your organization. Salesforce also checks and verifies any dependencies. An installer's organization must meet all dependency requirements listed on the Show Dependencies page or else the installation fails. For example, the installer's organization must have divisions enabled to install a package that references divisions. For more information on package dependencies, see Understanding Dependencies in Salesforce Help.

    When you install a component that contains an Apex script, all unit tests for your organization are run, including the unit tests contained in the new package. If a unit test relies on a component that is initially installed as inactive, such as a workflow rule, this unit test can fail. You can select to install regardless of unit test failures.

For reasons why Salesforce can prevent an install, see Why did my installation or upgrade fail? in Salesforce Help.

14. Click **OK**.
15. Configure your package. For more information, see Configuring Installed Packages in Salesforce Help.
16. If the package includes permission sets, assign the included permission sets to your users who need them.

    In managed packages, you can't edit permission sets that are included in the package, but subsequent upgrades happen automatically. If you clone a permission set that comes with a managed package or create your own, you can make changes to the permission set, but subsequent upgrades don't affect it.
17. If you're reinstalling a package, see Importing Package Data in Salesforce Help to reimport the package data using the export file you received after uninstalling.
18. If you installed a managed package, click **Manage Licenses** to assign licenses to users. For more information, see Managing Licenses for Installed Packages in Salesforce Help.

CHAPTER 5 App Rollout

Before you deploy the solution to your users, notify them of the new functionality, and educate them on how to use it. Then make it available to the users who have appropriate permissions.

Review the Splash Page

The developer of a solution can include a splash page that users see when they click a custom tab. Splash pages explain how the custom object fits in a Salesforce environment and can contain training or support links. Instruct users to review the splash pages for each custom tab. Show them how to use the **Don't show me this again** link. If the publisher didn't provide splash pages, create your own.

Preview the Solution for Select Users

Preview the solution with key users in your Salesforce org. Make any suggested changes from the feedback that you receive.

Announce the New App

Send an announcement to your users one week before deploying the solution. Let them know when the rollout is and how it benefits them. On the day of the deployment, send another announcement telling users to look for the new solution.

CHAPTER 6 After Installing a Package

After installing a solution from AppExchange, manage it like you manage the other solutions and packages you installed in your Salesforce org.

Manage Installed Packages

Manage packages installed in your Salesforce org, including assigning licenses to users, uninstalling packages, and exporting package data.

Note: Salesforce only lists license information for managed packages. For unmanaged packages, the license-related fields, such as **Allowed Licenses**, **Used Licenses**, and **Expiration Date**, displays the value "N/A."

- Click **Uninstall** to remove the package and all its components from your Salesforce organization.
- Click **Manage Licenses** to assign available licenses to users in your organization.

  Note: If you purchased a site license or if the managed package is not licensed, Salesforce assigns licenses to all your users and you can't manage licenses. Your users can use the package as long as they have the appropriate permissions.

- Click **Become Primary Contact** to update the current contact for the installed package to your username. This contact name displays for the package publisher from the Push Package Upgrade page. Initially, it's set to the name of the person who installed the package. If you have Download AppExchange Packages permission and aren't the current primary contact, this option is enabled.
- Click **Configure** if the publisher has included a link to an external website with information about configuring the package.
- Click the package name to view details about this package.
- View the publisher of the package.
- View the status of the licenses for this package. Available values include:
  - Trial
  - Active
  - Suspended
  - Expired
  - Free

  This field is only displayed if the package is managed and licensed.
- Track the number of licenses available (`Allowed Licenses`) and the number of licenses that are assigned to users (`Used Licenses`).
- View the date your licenses for this package are scheduled to expire.
- View the date your licenses were installed.
- View the number of custom apps, tabs, and objects this package contains.
- See whether the custom apps, tabs, and objects count toward your organization's limits. If they do, the box in the `Limits` column is checked.

Note: If you have not installed a licensed managed package, the `Publisher`, `Status`, `Allowed Licenses`, `Used Licenses`, and `Expiration Date` fields do not appear.

After an uninstall, Salesforce automatically creates an export file containing the package data, associated notes, and any attachments. When the uninstall is complete, Salesforce sends an email containing a link to the export file to the user performing the uninstall. The export file and related notes and attachments are listed below the list of installed packages. We recommend storing the file elsewhere because it's only available for a limited time after the uninstall completes. Using this list, you can:

- Click **Download** to open or store the export file.
- Click **Del** to delete the export file.

If a criteria-based sharing rule references a field from a licensed managed package whose license has expired, `(expired)` is appended to the label of the field. The field label is displayed in the field drop-down list on the rule's definition page in Setup. Criteria-based sharing rules that reference expired fields aren't recalculated, and new records aren't shared based on those rules. However, the sharing of existing records prior to the package's expiration is preserved.

Uninstall a Managed Package

Uninstalling a managed package removes its components and data from the org. During the uninstall process, any customizations, including custom fields or links, that you've made to the package are removed.

1. From Setup, enter *`Installed Packages`* in the Quick Find box, then select **Installed Packages**.
2. Click **Uninstall** next to the package that you want to remove.
3. Determine whether to save and export a copy of the package's data, and then select the corresponding radio button.
4. Select **Yes, I want to uninstall** and click **Uninstall**.

If you choose to save a copy of the package data, we create an export file containing the package data, associated notes, and any attachments. When the uninstall is complete, we send an email containing a link to the export file to the user performing the uninstall. We delete export files two days after a completed package uninstall.

Considerations on Uninstalling Packages

- If you're uninstalling a package that includes a custom object, all components on that custom object are also deleted. Deleted items include custom fields, validation rules, custom buttons, and links, workflow rules, and approval processes.
- You can't uninstall a package whenever a component not included in the uninstall references any component in the package. For example:
  - When an installed package includes any component on a standard object that another component references, Salesforce prevents you from uninstalling the package. An example is a package that includes a custom user field with a workflow rule that gets triggered when the value of that field is a specific value. Uninstalling the package would prevent your workflow from working.
  - When you've installed two unrelated packages that each include a custom object and one custom object component references a component in the other, you can't uninstall the package.

An example is if you install an expense report app that includes a custom user field and create a validation rule on another installed custom object that references that custom user field. However, uninstalling the expense report app prevents the validation rule from working.

  - When an installed folder contains components you added after installation, Salesforce prevents you from uninstalling the package.
  - When an installed letterhead is used for an email template you added after installation, Salesforce prevents you from uninstalling the package.
  - When an installed package includes a custom field that's referenced by Einstein Prediction Builder or Case Classification, Salesforce prevents you from uninstalling the package. Before uninstalling the package, edit the prediction in Prediction Builder or Case Classification so that it no longer references the custom field.

- You can't uninstall a package that removes all active business and person account record types. Activate at least one other business or person account record type, and try again.
- You can't uninstall a package if a background job is updating a field added by the package, such as an update to a roll-up summary field. Wait until the background job finishes, and try again.

CHAPTER 7 FAQ

A list of answers to frequently asked questions about installing apps from Lightning Platform AppExchange.

Can I uninstall packages that I installed from AppExchange?

Yes. All your installed packages are listed in the Installed Packages page. You can remove any package by clicking the **Uninstall** link next to the package name.

Who Can Use AppExchange?

Anyone can browse and test drive AppExchange listings. Salesforce admins and users with the Download AppExchange Packages permission can install AppExchange apps. To publish a listing on AppExchange, a user needs both Create AppExchange Packages and Upload AppExchange Packages permissions.

Why did my installation or upgrade fail?

An installation can fail for several reasons:

- The package includes custom objects that will cause your organization to exceed its limit of custom objects.
- The package includes custom tabs that will cause your organization to exceed its limit of custom tabs.
- The developer of the package has uploaded a more recent version of the package and has deprecated the version associated with this installation URL. Contact the publisher of the package to get the most recent installation URL.
- You're trying to install an extension to a package, and you don't have the base package installed.
- The package requires that certain components are enabled in your organization, or that required features are enabled in your edition.
- The package contains Apex code and you are not authorized to run Apex in your organization.
- The package you're installing has a failing Apex test.

Can I customize AppExchange packages?

Yes, all packages are customizable. However, to ensure compatibility with future versions, some aspects of managed packages can't be changed.

Who can use AppExchange Packages?

If you use an Enterprise, Unlimited, Performance, or Developer Edition organization, you can choose which user profiles have access to the package as part of the installation process. Packages installed in Professional and Group Edition organizations are installed with "Full Access" to all user profiles. However, regardless of Edition, all custom objects are installed in "In Development" mode which hides them from all standard users. Users must have the "Customize Application" permission to view custom objects in "In Development" mode. When you are ready to roll out the package to other users, change the custom object status to "Deployed."

How can I upgrade an installed package?

Managed packages are completely upgradeable. Before installing a package, contact the publisher to determine if it's managed.

How secure are the components I install?

Salesforce performs periodic security reviews of all publicly listed applications on AppExchange. When installing third party applications with access to data, these applications may have access to other data within the organization where the package was installed. Private listings do not go through a security review and administrators should inspect the application carefully before determining whether it should be installed within their organization.

What happens to my namespace prefix when I install a package?

A namespace prefix is a globally unique identifier that you can request if you plan to create a managed package. All the components from a managed package that you install from another developer contain the developer's namespace prefix in your organization. Unmanaged packages can have a namespace prefix while they're developed in an org that contains a managed package. This namespace isn't used outside of the development (publisher) org. If an unmanaged package is installed in an org that has no namespace, then the unmanaged components have no namespace in the subscriber org. If an unmanaged package is installed in an org that has a namespace, then the components get the namespace of the subscriber org.

Can I reinstall an AppExchange package after uninstalling it?

Yes. You can reinstall a package in the same manner that you installed it.

When I install a package that's listed on AppExchange, do custom objects, custom fields, tabs, and apps in

the package count against the limits of my Salesforce edition?

Your Salesforce edition is allocated a certain number of custom objects, custom fields, tabs, and other customizations. At the same time, all Salesforce orgs have a total limit on some of these items. If you install a package from AppExchange, its custom objects, custom fields, tabs, and apps don't count against your edition's allocation, but they do count against the total limit of your Salesforce org.

Note: These rules apply only to managed packages that are listed on AppExchange. If you install an unmanaged package or a managed package that's not publicly listed on AppExchange, its custom objects, custom fields, tabs, and apps count against the allocation for your Salesforce edition.

CHAPTER 8 AppExchange Considerations

Keep these considerations in mind when working with the solutions available on AppExchange.

AppExchange Support for Lightning Experience on iPad Safari

AppExchange solutions aren't supported on Lightning Experience on iPad Safari. We recommend that you use Lightning Experience on a desktop with solutions that you install from AppExchange.