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# Distribute Your Apps

Salesforce, Spring '24






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# WHICH TRIAL METHOD IS RIGHT FOR MY APPEXCHANGE SOLUTION?

The first step to offering trials of your AppExchange solution is to pick a delivery method. You can provide trials on your AppExchange listing using test drives or Trialforce orgs, or you can provide trials on your website using SignupRequest API. Learn about the differences between trial methods, and decide which options work best for your business.

 **Tip:** Choose one trial method or several—it's up to you! In general, the greater the variety of options, the more likely that prospects are to convert.

Trial Method	Where Are Trials Delivered?	How Does It Work?	Advantages
Trialforce	Your AppExchange listing	Using a Trialforce Management Org or Environment Hub, you create a Trialforce Source Org (TSO), install your solution, and add sample data. Using your TSO, you create a Trialforce template.  On AppExchange, your prospect requests a trial. They receive login credentials for a unique trial org based on your Trialforce template.	<ul style="list-style-type: none"> <li>• Offer flexible trial experiences using environments that prospects can keep and customize.</li> <li>• Add optional branding to your trial experiences.</li> </ul>
Test Drive	Your AppExchange listing	Using a preconfigured Trialforce template, you create a test drive org, install your solution, and add sample data.  On AppExchange, your prospect requests a test drive. They're directed to a read-only org that doesn't require login credentials.	<ul style="list-style-type: none"> <li>• Offer curated trial experiences using environments that don't require setup or customization.</li> <li>• Give the widest range of prospects the opportunity to explore your solution, including prospects with little Salesforce experience.</li> <li>• Provide your prospects instant access to a test org</li> </ul>
SignupRequest API	Your website using an HTML sign-up form	Using a Trialforce Management Org or Environment Hub, you create a Trialforce Source Org (TSO), install your solution, and add sample data. Using your TSO, you create a Trialforce template.  On your website, your prospect requests a trial. They receive login credentials for a unique trial org based on your Trialforce template.	<ul style="list-style-type: none"> <li>• Give prospects who visit your website the ability to try your solution.</li> <li>• Offer flexible trial experiences using environments that prospects can keep and customize.</li> <li>• Add optional branding to your trial experiences.</li> </ul>

[Custom Branding for Trialforce](#)

If you use Trialforce, you can optionally set up a branded login site and emails. By applying your company's look and feel to a login site and emails, customers are immersed in your brand from signup to log in. Apply custom branding only for non-CRM solutions. Don't apply it to solutions that extend Salesforce CRM and require standard objects, such as Leads, Opportunities, and Cases.

[Create and Edit Your Trialforce Source Organizations](#)

Use the Trialforce Source Organizations page to manage your Trialforce source organizations.

[Create a Trialforce Template](#)

Create a template to simplify signing up trial organizations.

## Custom Branding for Trialforce

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If you use Trialforce, you can optionally set up a branded login site and emails. By applying your company's look and feel to a login site and emails, customers are immersed in your brand from signup to log in. Apply custom branding only for non-CRM solutions. Don't apply it to solutions that extend Salesforce CRM and require standard objects, such as Leads, Opportunities, and Cases.

With a branded login page, you can specify your login domain and login site.

- A login domain ends with `.cloudforce.com`, so if your company name is "mycompany," your login domain is `mycompany.cloudforce.com`.
- Your custom login site includes your text and company logo and a mobile-friendly version of your login site.

With branded emails, you can specify fields in system-generated emails so that your company name, address, and other details are used in email correspondence. You can create multiple branded email sets for different campaigns or customer segments.

Branding isn't available for Trialforce Source Orgs created in the Environment Hub.

[Trialforce Branded Login Site](#)

Use the Trialforce Branded Login Site page to create, publish, and edit a login page that has your company's look and feel.

[Trialforce Branded Email Sets](#)

Trialforce Email Branding allows you to modify system-generated emails so that they appear to come from your company rather than from Salesforce. Trialforce Email Branding only applies to users who sign up for your application through Trialforce.

### EDITIONS

Available in: **Salesforce Classic**

Available in: **Developer Edition**

### USER PERMISSIONS

To manage Trialforce:

- **Customize Application**

## Trialforce Branded Login Site

Use the Trialforce Branded Login Site page to create, publish, and edit a login page that has your company's look and feel.

- If you haven't set up a login site yet, click **Set Up Login Site**.
- If you've already set up a login site, click **Publish** to make the site available, or **Launch Site Editor** to make changes. After you publish the Login page, you can't edit the subdomain.

### [Choose a Trialforce Login Site Domain](#)

Choose a subdomain for customers to log in to your application. Usually, the subdomain is the name of your company.

### [Create a Branded Login Page](#)

Customers typically log in to your app using the traditional `login.salesforce.com` site. A branded login page enables you to customize this domain and parts of this login page so you can provide a branded experience for your customers.

### [Design Your Login Pages](#)

Use the Login Branding Editor to design your login pages.

#### EDITIONS

Available in: Salesforce Classic

Available in: **Developer Edition**

#### USER PERMISSIONS

To define package branding:

- Package Branding

## Choose a Trialforce Login Site Domain

Choose a subdomain for customers to log in to your application. Usually, the subdomain is the name of your company.

 **Important:** After you publish the Login page, you can't edit the subdomain.


1. In the field provided, enter a name.
2. Click **Check Availability**.
3. Accept the terms of use.
4. Click **Save and Launch Editor**.

## Create a Branded Login Page

Customers typically log in to your app using the traditional `login.salesforce.com` site. A branded login page enables you to customize this domain and parts of this login page so you can provide a branded experience for your customers.

Your custom login site includes your text and company logo, and mobile-friendly versions of your login site as well.

1. Log in to your Trailforce Management Organization.
2. From Setup, enter *Login Site* in the *Quick Find* box, then select **Login Site**.
3. Click **Set Up Login Site**.
4. Select a subdomain for your login site by providing a name in the field provided. Usually, the subdomain is the name of your company.

 **Note:** A login domain ends with `.cloudforce.com`, so if your company name is "mycompany," your login domain is `mycompany.cloudforce.com`.

5. Check the availability of the domain and then accept the terms of use.

#### EDITIONS

Available in: Salesforce Classic

Available in: **Developer Edition**

#### USER PERMISSIONS

To manage Trailforce:

- Customize Application

6. Click **Save and Launch Editor**.
7. Use the Login Brand Editor to change how your login page looks. For additional help using the editor, click **Help for this Page**.
8. Click **Save and Close**.
9. If you're ready to make these changes available to your TSO, click **Publish**.

If you decide to publish later, your changes are saved and you can edit the subdomain if you change your mind. After you publish the Login page, you can't edit the subdomain.

## Design Your Login Pages

Use the Login Branding Editor to design your login pages.

1. Log into your Trailforce Management Organization.
2. From Setup, enter *Login Site* in the *Quick Find* box, then select **Login Site**.
3. At the top of the editor, click the tab for the login page size: **Desktop** or **Mobile**.
4. In the left pane, expand the Page Header node and click **Select File** to choose your company logo for each size screen your app supports.
5. In the **Logo Link** > **Use custom link** field, optionally, enter a web address to be used when a customer clicks your logo, such as your corporate website. The URL must start with `http://` or `https://`. If you leave this field blank, your logo will not have a link.
6. Expand the Page Content node and paste the URL of the trial sign-up link into the **Trial Sign-Up Link** > **Use custom link** field. This is the link your prospects will click to request a free trial on your website. Typically, ISVs create a separate sign-up page for this purpose.
7. Provide URLs for the right and bottom of the page. If you leave these fields blank, the frames default to the ones used on the Salesforce login page.
8. Expand the page footer and provide your company name and font color.
9. Expand the page background node and provide a background image and color.
10. At the top of the page click **Save and Close**.
11. On the Branded Login Site page, click **Preview** for the size of the page you want to see. Make sure your login page appears correct for each login page your app supports.

### EDITIONS

Available in: Salesforce Classic

Available in: **Developer Edition**

### USER PERMISSIONS

To manage Trailforce:

- Customize Application



## Trialforce Branded Email Sets

Trialforce Email Branding allows you to modify system-generated emails so that they appear to come from your company rather than from Salesforce. Trialforce Email Branding only applies to users who sign up for your application through Trialforce.

Each Trialforce source organization comes with a standard set of email notifications that are sent to customers. For example, customers get an email notification when they first sign up, or when they reset their password. You don't have to rewrite all of these system-generated emails yourself. Just provide the values for the fields and the system takes care of the rest.

### [Edit Trialforce Branded Email Set](#)

Each Trialforce source organization comes with a standard set of email notifications that are sent to customers.

## Edit Trialforce Branded Email Set

Each Trialforce source organization comes with a standard set of email notifications that are sent to customers.

To begin, click **New Email Set** or **Edit** next to an existing email set.

1. Fill in the fields with your company info.
2. In the Preview Emails area, click through the different types of generated emails and make sure they read correctly.
3. Click **Save**.
4. If you're ready to make these emails available to your Trialforce source organizations, click **Publish**. Otherwise your changes are saved and you can publish later.

## Create and Edit Your Trialforce Source Organizations

Use the Trialforce Source Organizations page to manage your Trialforce source organizations.

- If you have an existing source organization you want to use, click **Login**.
  - To edit an existing source organization, click **Edit**, then enter the source organization name and select the branding.
1. To create a new source organization, click **New**.
  2. Enter a new username and email address for the administrator account.
  3. Enter the source organization name and select the branding.
  4. Click **Create**.

### EDITIONS

Available in: Salesforce Classic

Available in: **Developer Edition**

### USER PERMISSIONS

To define package branding:

- Package Branding

### EDITIONS

Available in: Salesforce Classic

Available in: **Developer Edition**

### USER PERMISSIONS

To define package branding:

- Package Branding

## Create a Trialforce Template

Create a template to simplify signing up trial organizations.

1. Click **New Trialforce Template**. You can create a template only if your TSO is less than or equal to 1 GB.

You can create up to 10 Trialforce templates per TSO. If this button is grayed out, delete the excess templates before creating new ones. Partners that require additional templates can contact Salesforce Partner Support.

2. Specify a description of the template and whether to include data in the dialog that appears.
3. Click **Save**.

You receive an email with the ID of the new template after it's generated. Submit the template for review before you can use it to sign up trial organizations. Remember to generate a new template each time you make updates to your TSO so that your trials always reflect the most recent state.

Each template has a status with one of these values.

In Progress	When a template is first created, it always has this status. It then moves to either Success or Error status.
Success	The template can be used to create trial organizations.
Error	The template cannot be used because something has gone wrong and debugging is required.
Deleted	The template is no longer available for use. Deleted templates are removed during system updates.

### EDITIONS

Available in: Salesforce Classic

Available in: **Developer Edition**

### USER PERMISSIONS

To define package branding:

- Package Branding

# SIGN-UPS USING THE API

Use API calls to the SignupRequest object to create sign-ups for prospective customers.

Using API calls to the SignupRequest object, you can collect and analyze detailed information on all sign-ups from your business organization. You have control over the sign-up process and enhanced visibility into your prospective customers. For example, you can:

- Run reports and collect metrics, such as the number of sign-ups per day or the number of sign-ups in different countries.
- Customize the SignupRequest object to add fields of special interest to your company.
- Create triggers to initiate specific actions, such as send an email notification when a new sign-up request is made.
- Enable sign-ups from a wide range of client applications and devices, so you have more channels for customer acquisition.

For more information on working with objects, see the [Object Reference for Salesforce and Lightning Platform](#).

## [Create a Signup Request](#)

The Signup Requests tab displays the signup requests home page.

## [Signup Request Details](#)

From the Signup Request detail page you can delete and clone signup requests.

### USER PERMISSIONS

To create or view sign-up requests:

- SignupRequest API

## Create a Signup Request

The Signup Requests tab displays the signup requests home page.

From signup requests home page, you can perform these actions.

- Create a new signup. If you using a Trialforce template to create the signup, make sure the template has been approved.
  - View the details of a previous signup, including its history and approval status.
  - Create new views to display signups matching criteria that you specify.
1. To create a signup, select **Signup Request** from the Create New drop-down list in the sidebar, or click **New** next to **Recent Signup Requests** on the signup requests home page.
  2. Enter the information for the signup request.
  3. Click **Save** when you're finished, or click **Save & New** to save the current signup request and add another.

### USER PERMISSIONS

To create or view signup requests:

- Signup Request API

## Signup Request Details

From the Signup Request detail page you can delete and clone signup requests.

This table lists the attributes details (in alphabetical order).

Attribute	Description
Company	The name of the company requesting the trial signup.

Attribute	Description
Country	The two-character, upper-case ISO-3166 country code. You can find a full list of these codes at a number of sites, such as: <a href="http://www.iso.ch/iso/en/prods-services/iso3166ma/02iso-3166-code-lists/list-en1.html">www.iso.ch/iso/en/prods-services/iso3166ma/02iso-3166-code-lists/list-en1.html</a>
Created Org	The 15-character Organization ID of the trial organization created. This is a read-only field provided by the system once the signup request has been processed.
Email	The email address of the admin user for the trial signup.
Error Code	The error code if the signup request isn't successful. This is a read-only field provided by the system to be used for support purposes.
First Name	The first name of the admin user for the trial signup.
Last Name	The last name of the admin user for the trial signup.
Edition	The Salesforce template that is used to create the trial organization. Possible values are <code>Partner Group</code> , <code>Professional</code> , <code>Partner Professional</code> , <code>Sales Enterprise</code> , <code>Professional TSO</code> , <code>Enterprise</code> , <code>Partner Enterprise</code> , <code>Service Professional</code> , <code>Enterprise TSO</code> , <code>Developer</code> , and <code>Partner Developer</code> .
Preferred Language	The language of the trial organization being created. Specify the language using a language code listed under Fully Supported Languages in <a href="#">Supported Languages</a> in Salesforce Help. For example, use <code>zh_CN</code> for simplified Chinese. The value you select overrides the language set by the locale. If you specify an invalid language, the organization defaults to the default language of the country.  Populated during the sign-up request and for internal use by Salesforce.
ShouldConnectToEnvHub	When set to <code>true</code> , the trial organization is connected to the Environment Hub. The sign-up must take place in the hub master organization or a spoke organization.
Source Org	The 15-character Organization ID of the Trialforce Source Organization from which the Trialforce template was created.
Status	The status of the request. Possible values are <code>New</code> , <code>In Progress</code> , <code>Error</code> , or <code>Success</code> . The default value is <code>New</code> .
Template	The 15-character ID of the approved Trialforce template that is the basis for the trial signup. The template is required and must be approved by Salesforce.
Template Description	The description of the approved Trialforce template that is the basis for the trial signup.
Trial Days	The duration of the trial signup in days. Must be equal to or less than the trial days for the approved Trialforce template. If not provided, it defaults to the trial duration specified for the Trialforce template.
Username	The username of the admin user for the trial signup. It must follow the address convention specified in RFC822: <a href="http://www.w3.org/Protocols/rfc822/#z10">www.w3.org/Protocols/rfc822/#z10</a>