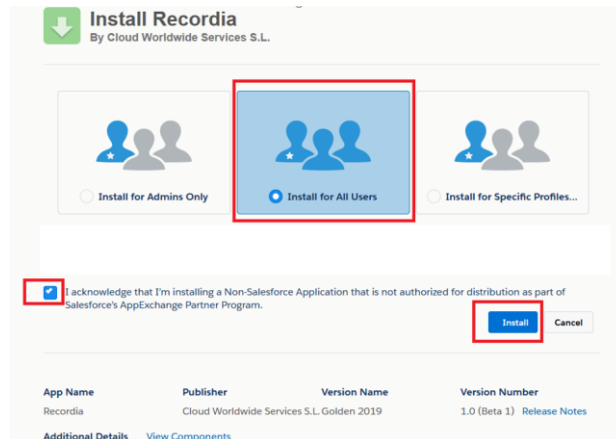


Release 1.0 – May 16, 2019

Install instructions

1. Install *Recordia call recording platform* integration for your desired user profiles



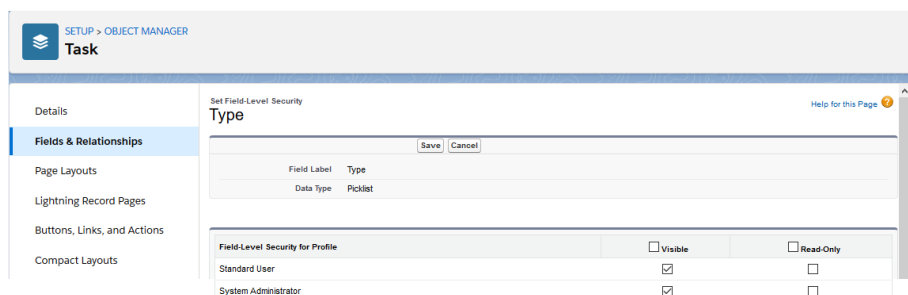
2. Activate *Contact Sharing*

From Setup->Security->Sharing Settings:

Contact Sharing Rules			
		New Recalculate	Contact Sharing Rules Help ?
Action	Criteria	Shared With	Contact
Edit Del	Owner in All Internal Users	All Internal Users	Read Only

3. Enable *visibility for Task.Type* field for the installation user profile

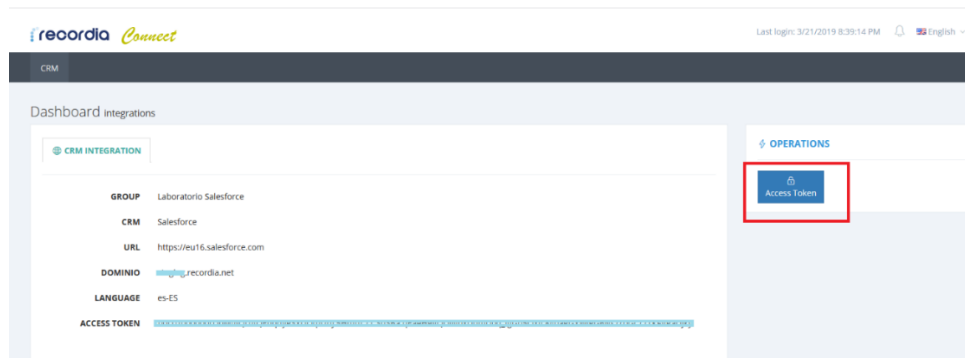
From Setup->Object Manager->Task->Fields & relationships->Type->Set Field-Level Security:



4. Give permission to Recordia to upload recordings to the Salesforce environment

Once the integration in Recordia has been configured and the application installed in the customer's Salesforce environment, please log in Recordia with a group Administrator user:

- Production: <https://www.recordia.net/crmauthorizer>
- Staging: <https://www.staging.recordia.net/crmauthorizer>



[Product Documentation](#)