

RemodelerGo

Setup & Configuration

Profile Permissions

Reload Company Settings

App Demo



improveit 360

Agenda

improveit 360 Go Sunset – **March 31, 2025**

Review the Setup Steps for using RemodelerGo:

- Set Profile Administrative Permissions
- Set Profile Object Permissions
- Set Profile Apex Class Access
- Adjust Fields in Page Layouts
- Assign Page Layouts to Profiles
- Reload Company Settings from RemodelerGo App
- 10-minute RemodelerGo demo video



Administrative Permissions

Administrative Permissions

Access Experience Management	<input type="checkbox"/>
Access Libraries	<input type="checkbox"/>
Add People to Direct Messages	<input type="checkbox"/>
Allow Inclusion of Code Snippets from UI	<input type="checkbox"/>
Allows users to modify Named Credentials and External Credentials	<input type="checkbox"/>
Allow user to modify Private Connections	<input type="checkbox"/>
Apex REST Services	<input checked="" type="checkbox"/>
API Enabled	<input checked="" type="checkbox"/>

View Reports in Public Folders	<input type="checkbox"/>
View Restriction and Scoping Rules	<input type="checkbox"/>
View Roles and Role Hierarchy	<input checked="" type="checkbox"/>
View Setup and Configuration	<input checked="" type="checkbox"/> 

Administration Setup

- Release Updates
- Manage Users**
 - Users
 - Mass Email Users
 - Roles
 - Permission Sets
 - Permission Set Groups
 - User Management Settings
 - Profiles**
 - Public Groups
 - Queues

Object Permissions

Custom Object	Read	Create	Edit	Delete	View All	Modify All
Appointment	✓	✓	✓			
Interests	✓	✓	✓	✓	✓	✓
Lead Sources	✓	✓				
Marketing Opportunities	✓	✓				
Products	✓					
Projects	✓					
Project Activities	✓		✓			
Prospects	✓					
Quotes	✓	✓	✓			
Quote Items	✓	✓	✓	✓		
Quote Templates	✓					
Quote Template Items	✓					
Receipt / Adjustment	✓	✓	✓			
Sales	✓	✓	✓			
Sale Items	✓	✓	✓			
Staff	✓					

Native Object	Read	Create	Edit	Delete	View All	Modify All
Documents	✓				✓	

Administration Setup

Release Updates

▣ Manage Users

Users

Mass Email Users

Roles

Permission Sets

Permission Set Groups

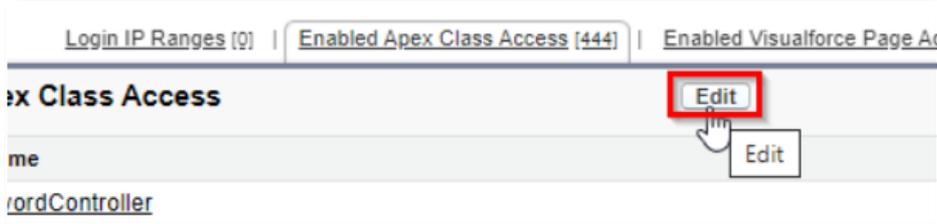
User Management Settings

Profiles

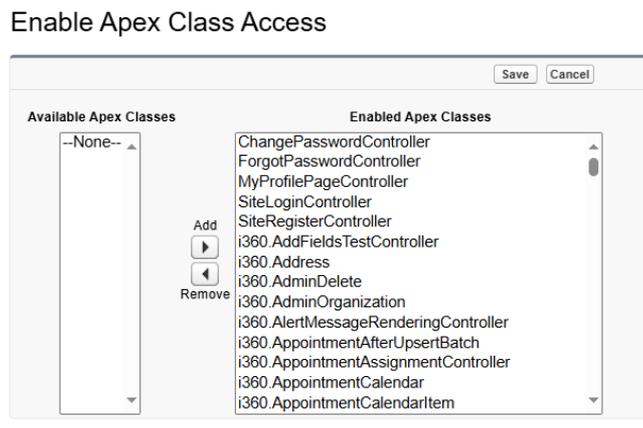
Public Groups

Queues

Enable Apex Class Access



These classes ensure your mobile users can collect payments and generate PDF documents.



Move **all** Apex Classes to the Enabled Column. Particularly, check for the following Apex Classes:

- i360.PDFGeneratorREST
- i360.PaySimpleMobileCheckoutToken
- i360.PaySimpleMobileCreatePayment
- i360.PaySimpleMobileCustomerPaymentMethods
- i360.PaySimpleMobileCustomerToken

Field Level Security

Project	[View]
Project Activity	[View]
Project Cost	[View]
Project Template	[View]
Project Template Activity	[View]
Prospect	[View]
Prospect Inbound Text	[View]
Prospect Search	[View]
Purchase Order	[View]
Purchase Order Line Item	[View]
Quote	[View]
Quote Item	[View]
Quote Template	[View]
Quote Template Item	[View]
Receipt / Adjustment	[View]
Repeating Time Block	[View]
Sale	[View]
Sale Item	[View]

Check the following Object Fields:

Prospect

-i360__Correspondence_Name__c

Sale

-i360__Payment_Link_Phone__c

-i360__Payment_Processed_On__c

-i360__PaySimple_Import_Payload__c

-i360__Send_Email_with_Payment_link__c

-i360__Send_Text_with_Payment_Link__c

Contact	Lookup	<input checked="" type="checkbox"/>
Contact Phone	Text	<input checked="" type="checkbox"/>
Correspondence Name	Text	<input checked="" type="checkbox"/>
County	Text	<input checked="" type="checkbox"/>

NOTE: Any Fields in the Page Layout, User Profiles will need at least Read access to those Fields

Set Page Layout on Object

App Setup

- Customize
- Create
 - Apps
 - Custom Labels
 - Objects**
 - Big Objects
 - Picklist Value Sets
 - Packages
 - Report Types
 - Tabs
 - Service Cloud Launch Pad
 - Action Link Templates

Page Layouts New Page Layout Assignment

Action	Page Layout Name	Installed Package	Created By
Edit Del 	Appointment 12	i360 Pro	Olivia Admin , 2/19/2019 4:47 PM
Edit Del 	Mobile	i360 Pro	i360 Pro, 2/19/2019 4:47 PM
Edit Del 	RemodelerGo	i360 Pro	i360 Pro, 2/16/2023 10:12 PM

Admin Tip: If you want different Profiles to see different Fields, Clone the RemodelerGo Page Layout and create a new Page Layout with different fields to assign to other Profiles.

Set Fields in Page Layouts

The screenshot shows the Salesforce Page Layout Editor interface. At the top, there's a toolbar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', and 'Redo'. Below that is the 'Layout Properties' tab. The main area is divided into a 'Fields' section on the left and a 'Page Layout' section on the right. The 'Fields' section has a 'Quick Find' box and a list of fields. The 'Page Layout' section shows a list of fields with a 'CompanyCam Link' field being dragged from the 'Fields' section to the 'Page Layout' section. A red arrow points from the 'CompanyCam Link' field in the 'Fields' section to the 'CompanyCam Link' field in the 'Page Layout' section.

Field Name	Field Name	Field Name	Field Name	Field Name	Field Name	Field Name
Section	Appointment Count	Appt Calendar Com...	Birthday	City	Company	Confirmed
Blank Space	Appointment Date	Assigned By	Calendar Custom Text	Close	CompanyCam Link	Confirmed B
Address	Appointment Name	Assigned On	Canceled	Close Price	Computed End Date...	Confirmed O
Address Verified	Appointment Time	Attachment Upload...	Canvassing	Comments	Computed Start Da...	Confirmed w

Appointment Name: Sample Text
Type: Sample Text
Appointment Date: 11/1/2023
Appointment Time: Sample Text
Duration: Sample Text
Move Up: ✓
Move Up Icon: Sample Text
Canvassing: ✓
Not Resulted: 46,079
Future: 75,112
No. of Reschedules: 10,397
Sales Rep 1 Email: sarah.sample@company.com

Address Information and Comments
Address: Sample Text
City: Sample Text
State/Province: Sample Text
Zip/Postal Code: Sample Text
Year Home Built: Sample Text

Prospect Phone: Sample Text
Prospect Email: Sample Text
Email Appt. Confirmation to Prospect: ✓
Email Appt. Cancellation to Prospect: ✓
Time Block: Sample Text

Drag and Drop from the Fields section

Note: Native Salesforce Page Layouts allow you to display fields from other related objects.

Appointment Page

- Result 1, 2, 3 and Result Detail 1, 2, 3 need to be added to the Page Layout

Project Activity Page

- Be sure to remove the "Type" field from the Page Layout and use "Activity Type" instead

NOTE: Any Fields in the Page Layout, User Profiles will need at least Read access to those Fields

Assign Page Layout to Profiles

The screenshot displays the Salesforce Page Layout Assignment interface. On the left, a list of profiles is shown, with 'Dept - Sales & Marketing' selected. A dropdown menu is open, showing 'RemodelerGo' as the selected page layout. On the right, a table titled 'Page Layouts' lists the assigned page layouts for various profiles.

Action	Page Layout Name	Installed Package	Created By
Edit Del	Appointment 12	i360 Pro	Olivia Admin, 2/19/2019 4:47 PM
Edit Del	Mobile	i360 Pro	i360 Pro, 2/19/2019 4:47 PM
Edit Del	New RemodelerGo		Olivia Admin, 11/1/2023 2:20 PM
Edit Del	RemodelerGo	i360 Pro	i360 Pro, 2/16/2023 10:12 PM

Click on the Profile you wish to assign the RemodelerGo Page Layout

Use Ctrl + click to select multiple Profiles at the same time and assign them all the RemodelerGo Page Layout.

Repeat last 2 Steps on main Objects

You will need to repeat the Last 2 Steps of:

1. Set the Fields within the Page Layout and
2. Assign the RemodelerGo Page Layout to your Profiles on all the following 10 Objects:

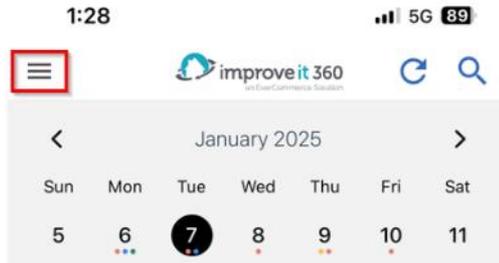


1. Prospect
2. Marketing Opportunity
3. Appointment
 - Result 1, 2, 3 and Result Detail 1, 2, 3 need to be added to the Page Layout
4. Quote
5. Quote Items
6. Sale
7. Receipts & Adjustments
8. Project
9. Project Activity
 - Be sure to remove the “Type” field from the Page Layout and use “Activity Type” instead
10. Staff

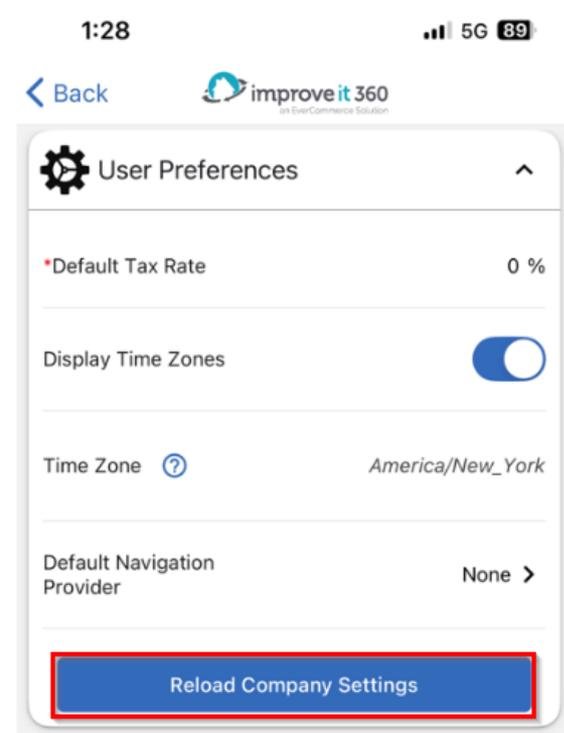
Last Step! Reload Company Settings

Login to RemodelerGo to complete this step!

From the **Settings** menu
Tab **Reload Company Settings**



Note: Anytime a Page Layout is changed, Users will need to Reload Company Settings to see those changes take effect.



View All Calendars

Admin Users can set which User Profiles can View All Calendars from RemodelerGo

Follow the steps in this Article: [How to View All Calendars on RemodelerGo](#)

Be sure you have created **Custom Attributes** for the Connected App to enable this feature.

Action	Attribute key	Attribute value
Edit Del	projectActivitiesNumberOfDaysBack	TEXT(\$Setup.i360__Public_System_Settings__c.i360__Mobile_Project_Activities_Days_Back__c)
Edit Del	disablePhoneNumbers	IF(\$Setup.i360__Mobile_App__c.i360__Disable_Phone_Numbers__c, 'true', 'false')
Edit Del	appointmentsNumberOfDaysBack	TEXT(\$Setup.i360__Public_System_Settings__c.i360__Mobile_Appointments_Days_Back__c)
Edit Del	useFractionalInches	IF(\$Setup.i360__Mobile_App__c.i360__Use_Fractional_Inches__c, 'true', 'false')
Edit Del	tasksNumberOfDaysBack	TEXT(\$Setup.i360__Public_System_Settings__c.i360__Mobile_Tasks_Days_Back__c)
Edit Del	seeAllCalendarProfiles5	\$Setup.i360__Public_System_Settings__c.i360__Mobile_See_All_Calendar_Profile5__c
Edit Del	seeAllCalendarProfiles1	\$Setup.i360__Public_System_Settings__c.i360__Mobile_See_All_Calendar_Profile1__c
Edit Del	seeAllCalendarProfiles3	\$Setup.i360__Public_System_Settings__c.i360__Mobile_See_All_Calendar_Profile3__c
Edit Del	profileNameAssigned	\$Profile.Name
Edit Del	seeAllCalendarProfiles2	\$Setup.i360__Public_System_Settings__c.i360__Mobile_See_All_Calendar_Profile2__c
Edit Del	seeAllCalendarProfiles4	\$Setup.i360__Public_System_Settings__c.i360__Mobile_See_All_Calendar_Profile4__c

10-minute RemodelerGo Demo

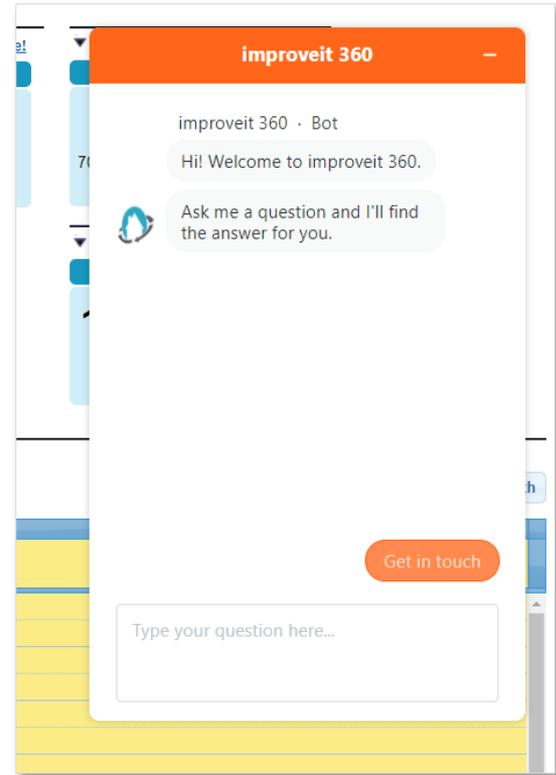


How to Reach Us

1. Admins – Use the Help Bot within your system: Click **Get in Touch**
2. Open a Ticket at:
<https://support.improveit360.com/>
3. Or Email Us:
support@improveit360.com

Support Office Hours:

Monday – Friday, 9am-5:30pm Eastern time



Thanks
for Attending



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