

## Accounts Creation Guide

This guide explains how to create Report Engine 2 accounts and users for your organization using the given license information. This information includes CID - Your company ID, UID - User ID, UPW - User password.

After installing the application, please do the following before attempting STEP 01 to STEP 06 below.

1. Go to "Setup"/ "App Setup"/ "View Installed Packages".
2. Click "Manage Licenses" link in the Action column of "Report Engine 2" package and go to "Licensed Users" section.
3. Click "Add Users" button and select the user(s) you want to assign licenses from "Available Users" section. (The trial ID will allow to add two users.)
4. Click "Add" button to confirm your selection.

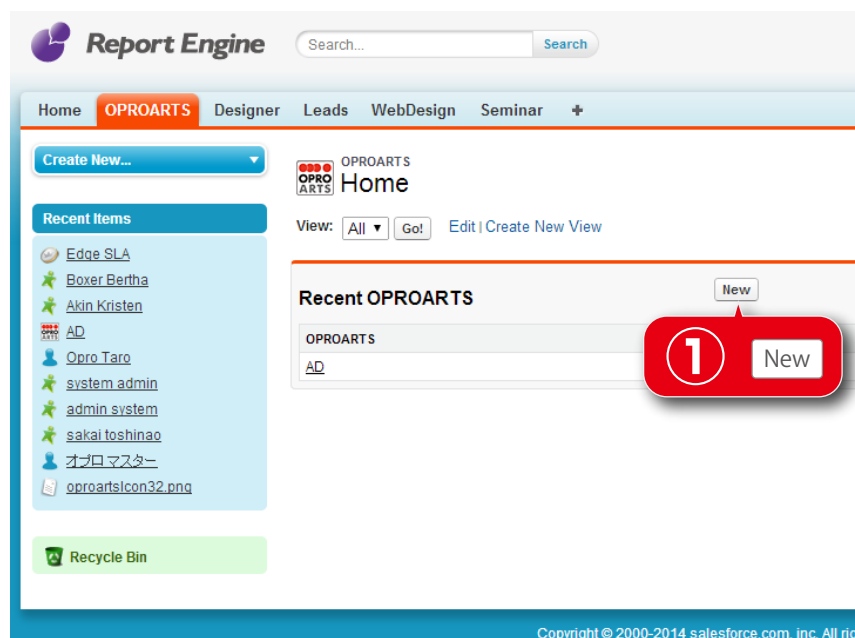
### STEP 01

Start Report Engine 2 by selecting the "Report Engine 2" from the Force.com drop down on the top right of the Salesforce window.

### STEP 02

Once you go to Report Engine 2, you can create Report Engine 2 accounts in the OPROARTS tab.

- 1 All the accounts available for this organization will be displayed here. Click "New" button to create a new account.



## STEP 03

Once the “New” button is clicked on the OPROARTS tab, you will be redirected to the page where new accounts can be created.

- 1 Enter “AD” into the “OPRO ARTS” field and the “CID” value provided by OPRO Japan Co., Ltd into the “CID” field.
- 2 Click the “Save” button to save the details.

The screenshot shows the 'New OPROARTS' form in the Report Engine interface. The 'CID' field contains a long alphanumeric string, and the 'OPROARTS' field contains 'AD'. A red circle with the number '1' highlights the 'OPROARTS' field. Below the form, a red circle with the number '2' highlights the 'Save' button.

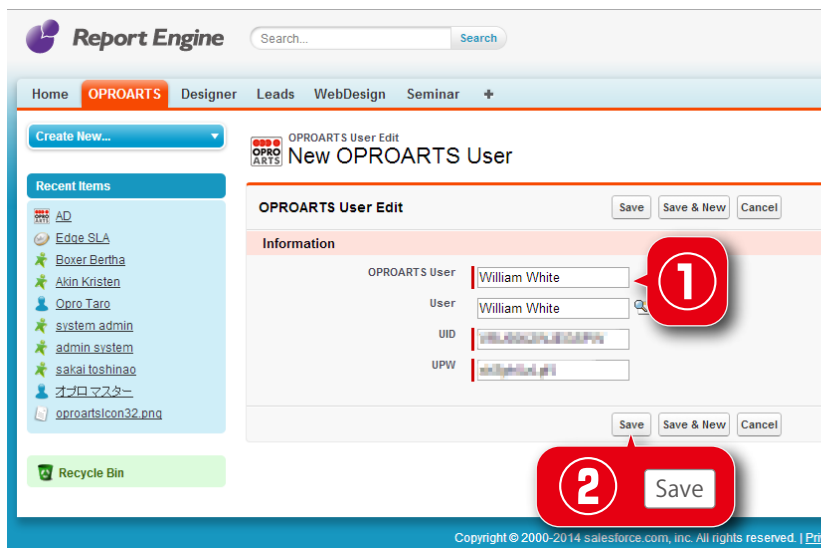
## STEP 04

The screenshot shows the 'OPROARTS Detail' page. The 'OPROARTS Users' table is visible, showing a single user named 'Opro Taro'. A red circle with the number '1' highlights the 'New OPROARTS User' button.

- 1 Click the “New OPROARTS User” button to create new users for the created account. Once an account has been created, select the account name to view more details about the created account.

If the User logs into the Report Engine 2 using the external interface, without using the integration from within the Salesforce.com account, some limitations will be encountered. Because of the inability to verify the Salesforce account used, all user logins through the external interface are treated as working on Professional accounts and some functionalities are automatically disabled.

## STEP 05



1

Select the user who needs to be assigned. Browsing for already existing Salesforce users can be done by clicking the browse button.

After selecting a user, you have to give the OPROARTS Username. Once that is done give the authentication details, "UID" and "UPW" provided by OPRO Japan Co., Ltd.

2

Click the save button to save the user details.

Once the "New OPROARTS User" button is clicked, the "New OPROARTS User" window will be displayed.

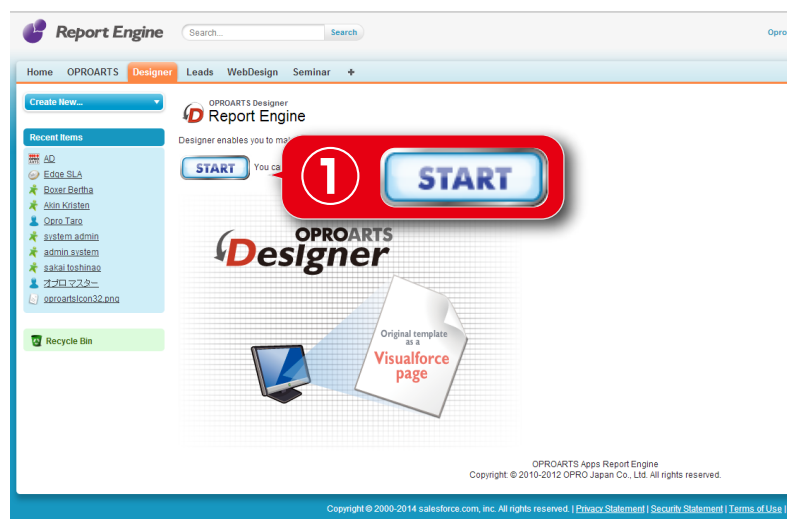
Congratulation! You have completed creating Accounts and Users for Report Engine 2. You can now start using Report Engine 2.

## STEP 06

Once the Accounts and Users have been created, select the "Report Engine 2" tab.

1

Click "Start" button to start using Report Engine 2 and you will be directed to the Report Engine 2 template creation workspace.



\*Please advise us your Salesforce Organization and CID which we provided when you purchase Report Engine 2. (If we are not informed, CID will expire after 30 days.) Send Email to:

✉ [support\\_info@jp.opro.net](mailto:support_info@jp.opro.net)

\*If you have installed to the Sandbox, it is not necessary to inform your Organization Name, however, usage will limit to 30 days.