

VRM 1.0 by Business Endurance Solutions
Installation Instructions for NFP

1. Navigate to the following URL to install VRM:

<https://login.salesforce.com/?startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04t80000000YIhO>

2. Follow the instructions for installation. When asked, uncheck APEX Notification checkbox during the installation.
3. After installation has complete, in Salesforce.com, click on Setup⇒App Setup ⇒Customize⇒Contacts⇒Page Layouts. Select the layout you'd like the Relationships Related List to display on, and press Edit.
4. Add the related list named “**Relationship List**” into the page layout.
5. Once added, double click the Relationship List related list to customize it. Add the following fields:
 - a. Related To
 - b. Type
 - c. Primary Relationship
 - d. Created By
6. Additionally, check uncheck the Standard Button called **New** and add the two available buttons listed below:
 - a. New Relationship
 - b. Visualize Relationships
7. Press Save. Then save your page layout.
8. Additionally, you can add the Relationships to the Account Page Layout.
9. Navigate to App Setup ⇒Customize⇒Accounts⇒Page Layouts.
10. Edit the page layout and add the related list named **Relationships** into the page layout.
11. Add the following fields:
 - a. Contact
 - b. Primary Relationship
 - c. Created By
12. Uncheck the Standard Button called **New**. **Do NOT** add the custom buttons. Press Save, then Save the page layout. **Installation Complete!**