



Aforza Guides Introduction & Instructions

Thank you for downloading this Aforza Guide. This introduction document will provide you with the necessary information to install the guide, contact us for support, and understand the warranty details.

Table of Contents

1. Introduction
2. Installation Instructions
3. Support
4. Contact Information
5. Testing

1. Introduction

Aforza's Business Process Library is a comprehensive collection of out-of-the-box business processes designed to cover all front office personas. These guides are built using Aforza's Guides capability, allowing you to execute and manage processes even when offline. Our process flows can be shared across multiple markets and tailored to meet your specific requirements.

2. Installation Instructions

To install this Aforza Guide, please follow these simple steps:

1. Download your chosen guide at aforza.com/business-process-library
2. Unzip the downloaded package
3. Log in to your Aforza environment as an administrator
4. Navigate to Visit Planning > Guides
5. Select 'Import Guide' and select the json file (as above)

Important points:

- The guide will be imported into the guides builder library with the prefixed name of '[Imported] Guide Name'. This name can be edited.
- Any Aforza Studio asset guide step elements will need to contain references to assets from your own Aforza Studio instance.
- Any image display guide step elements will need to contain assets from either your own Aforza Studio instance or your Salesforce images.



- Any Custom object step elements should be appropriately configured within the mobile configuration tool to ensure forms, permissions and filters have been appropriately set.
- Any linked guide step elements will need to reference guides stored within your Aforza org.
- Any Audit step elements should be checked to ensure the appropriate audit type has been selected to align with your business needs.

3. Support

Our support team is available to assist you with any issues or inquiries related to this Guide. You can contact us through the following methods:

- Email: support@aforza.com
- Aforza Support Portal: <https://success.aforza.com>
- Phone: +44 (0) 1442 780 183

4. Contact Information

For any questions or additional information, please reach out to us:

- Email: support@aforza.com
- Phone: +44 (0) 1442 780 183
- Address: Aforza Support, Park House, Greyfriars Road, Cardiff, CF10 3AF, United Kingdom

5. Testing

These guides are provided as example processes and should be thoroughly tested in a sandbox environment before being deployed in a live setting. It is the customer's responsibility to ensure the guides meet their specific requirements and function correctly within their systems before deployment.

Thank you for choosing Aforza. We are committed to helping you optimise your business processes with ease.

© 2024 Aforza Inc. All rights reserved.