Salesforce Labs Sales Org In a Box Install Guide
IMPORTANT PLEASE Complete the following Steps Before Trying to Install the Package

Step 1: Configure Salesforce Settings (Estimated time 5 Mins)

Before installing the package, update the following settings:

- **Enable Quotes**
  - In **Quick Find** (top left), search for **Quote Settings**.
  - Enable **Quotes**.
- **Enable Opportunity Teams**
  - In **Quick Find**, search for **Opportunity Team Settings**.
  - Enable **Opportunity Teams**.
- **Enable Contact to Multiple Accounts**
  - In **Quick Find**, search for **Account Settings**.
  - Click **Edit** and enable **Allow users to relate a contact to multiple accounts**.
- **Enable Notes**
  - In **Quick Find**, search for **Note Settings**.
  - Enable **Notes**.
- **Create a Custom Activity Type (Not required if an existing Task record type exists)**
  - Go to **Object Manager** in setup,
  - Select **Task**,
  - Click **Record Types,**
  - Click New
  - Type “Other” where it says Task Label,
  - Click Next
  - Click Save
- **Enable Data Protection and Privacy**
  - In Quick Find, Search Data Protection and Privacy
  - Click Make Data Protection details available in records
  - Click Save

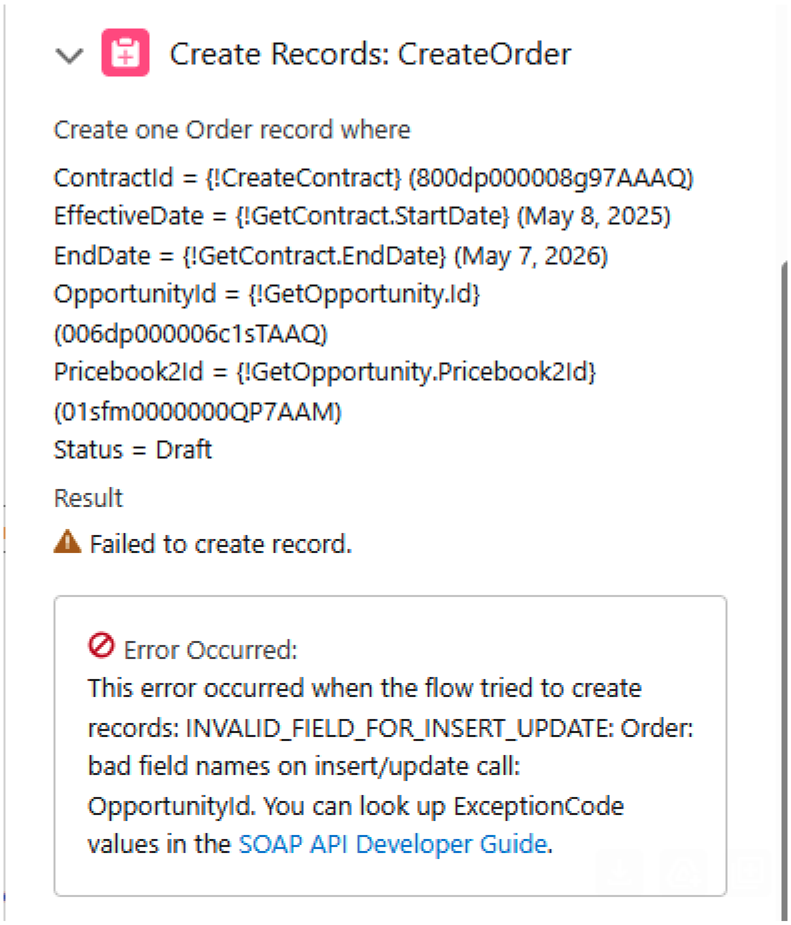
Step 2: Install the Sales in a Box Package

Step 3: Assign Permissions (Estimated time 1 Min)

1. Go to **Permission Sets**.
2. Assign the **SFS Permission Set** to your **Admin User**.

- This permission set provides access to all **custom objects and fields** included in the package.
- N.B. You can also add this permission set to any other users who you would like to provide access to

3. ***Important:*** *In version 1.0.0 you will need to clone the SFS Permission Set. Then go to Object Settings, Contract, Edit, Select View and Edit against the Opportunity Field Click Save. Use this permission set instead of the SFS Permission Set. In version 1.2.0 you may need to clone the permission set go to Object Settings, Order, Edit, Select View and Edit against the Opportunity Field. You will need to do this if you get the following error*



Step 4: Update Opportunity Stage Values (Estimated time 7 Mins)

At present it is not possible to add values to existing picklists therefore you will need to add the following values manually.

Stage Name	Type	Probability	Forecast Category	Sales Process

Qualified	Open	5%	Pipeline	SFS New Business Sales Process
Discovery	Open	10%	Pipeline	SFS New Business Sales Process
Demonstration	Open	15%	Pipeline	SFS New Business Sales Process
Pricing/Negotiation	Open	20%	Best Case	SFS New Business Sales Process/SFS Renewal Sales Process
Contracting	Open	75%	Commit	SFS New Business Sales Process/SFS Renewal Sales Process

You will then need to reorder the values so they look like below images

Step 5: Assign Record Types for Accounts

1. In **Setup**, use the **Quick Find** search bar (top left) and type **Profiles**.

2. Select the profile(s) you want to update (e.g., **Sales**).
3. Scroll down to **Record Type Settings** and click **Edit** next to **Accounts**.
4. Move the following record types into the selected list:
- **Competitor**
- **Customer**
- **Partner**
- **Prospect**
1. Set the **default record type** to **Prospect**.
2. Click **Save**.

Note: This ensures that when users convert leads or contacts without an existing account, the system assigns the **Prospect** record type by default.

Step 6: Assign Record Types for Opportunities

1. Scroll down to **Opportunities** (right side of the screen).
2. Click **Edit** next to **Opportunities**.
3. Move the following record types into the selected list:
- **New Business**
- **Renewal**
1. Set the **default record type** to **New Business**.

Exception: If your **Renewals Team** has a separate profile, set their default record type to **Renewal** instead.

1. Click **Save**.

Step 7: Assign Record Types for Events

1. Scroll down to **Events**.
2. Click **Edit** next to **Events**.
3. Move the following record types into the selected list:
- **Customer Meeting**
- **Internal Meeting**
- **Prep**
- **Admin**
1. Set the **default record type** to **Customer Meeting**.
2. Click **Save**.

Future Enhancement: In upcoming releases, **Einstein Activity Capture** may automatically assign meeting types based on these record types.

Step 8: Assign Record Types for Leads

1. Scroll down to **Leads** (left side of the screen).
2. Click **Edit** next to **Leads**.
3. Move the following record types into the selected list:

- **New Contact**
- **Existing Contact**

1. Set the **default record type** to **New Contact**.
2. Click **Save**.

Step 9: Assign Record Types for Tasks

1. Scroll down to **Tasks**.
2. Click **Edit** next to **Tasks**.
3. Move the following record types into the selected list:

- **Call**
- **Email**
- **Task**

1. Set the **default record type** to **Task**.
2. Click **Save**.

Step 10: Adjusting Global Actions

1. Go to **Setup**.
2. In the Quick Find box, type **Global Actions** and select it.
3. Click **New Task**, then click **Edit**.
4. Locate **Record Type**:

- If it says **Master**, change it to **Task**.

1. Return to **Global Actions**.
2. Select **Log a Call**, click **Edit**, and change the **Record Type** from **Master** to **Call**.
3. Go back to **Global Actions**.
4. Select **New Event**, click **Edit**, and change the **Record Type** from **Master** to **Customer Meeting**.
5. Click **Save**.
6. Verify that the following global actions have been updated:

- **Log a Call**
- **New Event**
- **New Task**

Step 11: Assigning Page Layouts

1. Go to **Setup**.
2. Navigate to **Object Manager**.

3. For each of the following records, follow the steps below:
- **Account**
- **Lead**
- **Opportunities**
- **Quotes**
- **Contacts**
- **Products**
- **Tasks** (if applicable)
1. Click on the object (e.g., **Account**).
2. Select **Lightning Record Pages**.
3. Locate the three new record pages:
- **Prospect**
- **Customer**
- **Competitor**
1. Right-click each record page and select **View**.
2. Click **Activation** in the top right corner.
3. Select **App, Record Type, and Profile**.
- **Do not** set these as app defaults (they won't save correctly).
1. Click **Assign to Apps, Record Types, and Profiles**.
2. Scroll down and select **Sales**.
3. Click **Next**.
4. Match the **Record Type Page** with the appropriate **Record Type**:
- Example: **Account Record Page Prospect** → Assign to **Prospect Record**.
1. Click **Next**.
2. Assign it to the appropriate **Profiles**:
- Typically **System Administrator** and **Standard User**.
- If you have custom profiles, assign accordingly.
1. Click **Save**.
2. Repeat these steps for the following record type pages:
- **Customer**
- **Prospect**

Step 12: Assigning Record Pages for Opportunities

1. In **Object Manager**, select **Opportunity**.
2. Navigate to **Lightning Record Pages**.
3. Locate and follow these steps for each record page:
- **New Business**:
    - Click **View** > **Activation** > **App, Record Type, and Profile**.
    - Assign to **Sales**.
    - Assign to **System Administrator** and **Standard User**.
    - Click **Save**.
- **Renewal**:
    - Follow the same steps as above.

1. Click **Save**.

Step 13: Assigning Record Pages for Lead

1. In **Object Manager**, select **Lead**.
2. Navigate to **Lightning Record Pages**.
3. Locate the record pages and follow these steps:

- **New Contact**:
  - Click **View** > **Activation** > **Record Type**.
  - Assign to **Sales**.
  - Assign to **Standard User** and **System Administrator**.
- **Existing Contact**:
  - Follow the same steps as above.

1. Click **Save**.

Step 14: Assigning Record Pages for Quotes

1. Go to Object Manager
2. Go to Quotes in Salesforce.
3. Go to Lightning Record Pages
4. Select the SFS Lightning record Page
5. Note that the package currently does not contain any record types for quotes (this may come in future releases).
6. Click Activation.
7. Assign Sales role.
8. Click Next.
9. Select Record Type: Master.
10. If you have custom record types, you can select them as well.
11. Click Submission.

Step 15: Assigning Record Pages for Orders

1. Go to Object Manager.
2. Navigate to Order Sales.
3. Go to Lightning Record Pages
4. Select the SFS Lightning record Page
5. Click Activation.
6. Select Record Type: Master.
7. Click Next.
8. Click Save.

Step 16: Assign Page Layouts

You will need to assign the appropriate page layouts for multiple objects.

Assign Page Layout for Account

1. Go to Object Manager > Account.
2. Click Page Layout Assignment (top right of the screen).
3. Click Edit.
4. Scroll down to Standard User.
5. Click Competitor, then hold Shift and select multiple rows.
6. Click SFS Account.
7. Click Save.
8. Click Next to assign for Prospect.
9. Scroll down and click Edit Assignments.
10. Select the rows you want to change.
11. Select SFS Account Page Layout.
12. Click Save.

Assign Page Layout for Contract

1. Go to Object Manager > Contract.
2. Click Page Layout Assignments.
3. Click Edit Assignments.
4. Scroll down, select Standard User and System Administrator.
5. Select SFS Contract Layout.
6. Click Save.

Assign Page Layout for Event

Go to Object Manager > Event.

1. Click Page Layout Assignment.
2. Click Edit Assignments.
3. Scroll down, select Standard User, System Administrator, or your Custom Profile.
4. Hold Shift and select SFS Event Layout.
5. Click Save.

Assign Page Layout for Lead

1. Go to Object Manager > Lead.
2. Click Fields and Relationships.
3. Click Edit Assignment.
4. Change only for Existing Contact Record Type.
5. Select SFS Contact Lead Layout.
6. Click Save.

Assign Page Layout for Opportunity

1. Go to Object Manager > Opportunity.
2. Click Page Layout.
3. Click Edit Assignment.
4. Scroll down and select user profiles (New and Renewal Collect).
5. Select SFS Opportunity Page Layout.
6. Click Save.

Assign Page Layout for Order

1. Go to Object Manager > Order.
2. Click Page Layout Assignment.
3. Click Edit Assignment.
4. Scroll down to your profile.
5. Change it to SFS Order Layout.Click Save.

Assign Page Layout for Quote

1. Go to Object Manager > Quote.
2. Scroll down to SFS Quote Layout.
3. Click Save.
4. Assign Page Layout for Task
5. Go to Object Manager > Task.
6. Click Page Layout Assignment.
7. Click Edit.
8. Select SFS Task Layout.
9. Click Save.

Step 17: Add Quick Action Buttons to Page Layouts

1. Go to Each Page Layout.
2. Click Buttons, Mobile, and Lightning Actions.
3. Add the following quick action buttons:
4. New Event
5. New Task
6. Log Call
7. Send Email or Send Message
8. Click Save.
9. Repeat this process for each page layout.

Step 18: Enable Path for Contracts

1. Go to Setup

2. Quick Fine Path Settings
3. Enable

Step 19: Lead Mapping

1. Go to Setup
2. Object Manager
3. Lead
4. Field and Relationships
5. Map Lead Fields (Right Side of the Screen)
6. Go to the Opportunity tab
7. Next to budget on the lead field select budget on the opportunity tab

Step 20: Automations

Opportunity - Next Step

There are two methods included regarding tracking the next step history on an opportunity. The first uses the Opportunity history field. The advantage of this method is that you can see the whole opportunity history in a single place. However you may not want this to be the case. I.e a user should only see some information. In that case you will likely want to use Notes.

To use the Opportunity History field option enable the flow: Opportunity:RT:Update History Field on Next Step Update

To use the Opportunity Note enable the flow : Opportunity:RT:Create Content Note on next step update

Do not enable both as this will cause issues with the date formula automation

Go to Setup, In the quick fine box type Flows click on the flow you want to activate and click activate.

Final Check

1. Review all changes in **Global Actions** and **Object Manager**.
2. Ensure the correct **Record Types** and **Profiles** are assigned.
3. Verify that all updates have been properly saved.