



SEAMless Sales®

MANDATORY



Sales Opportunity Snapshot

SOS FOR SFDC APP INSTALLATION INSTRUCTIONS

Title	Technical Specification
Version No.	1.1
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Version History

Version	Date	Author	Change(s)	Sections Affected
2.0	Jan 5, 2025	Art Fromm and Team	Based on original guide created by developer	None
2.1	July 9, 2025	Art Fromm	Updates and clarifications	Various
2.2	August 19, 2025	Art Fromm	AppExchange install as "everybody" added, and Uninstall Notes added.	Intro Uninstall section added

Table of Contents

Contents

Introduction	2
SOS for SFDC App Schema	2
App Design	2
Technical Approach	3
Installation Steps	3
Uninstalling the App.....	12

For help, questions, or to benefit from sales transformation programs, please contact us here: <https://teamsalesdevelopment.com/sos-for-sfdc/>

Introduction

This document consists of details for successful installation and full use of the SOS for Salesforce app developed in Salesforce by Team Sales Development.

! **Enterprise, Unlimited, or Developer edition is a prerequisite!**

! **App must be installed for “Everybody” from AppExchange!**

SOS for SFDC App Schema

The SOS for SFDC App adds several objects to the Salesforce database to uniquely store and manage SOS data. These objects are separate from the out of the box objects because in some cases, depending on the Salesforce environment being used, the out of the box objects may not have been installed.

- **SOS Action** – An object which manages Actions that belong to an SOS for a given opportunity. Actions can be assigned to the Opportunity owner, to another Salesforce user, or to someone outside of Salesforce. As you will see, a tab on the top menu is created to list all Actions or actions assigned to the active user in these procedures.
- **SOS Competitor** – An object which manages Competitors across the entire Salesforce org. Competitors are added to an SOS using the Competitor Tab in the SOS App. As you will see, a Related List will be created for a given Competitor listing all the SOS Opportunities to which it has been added, along with all the attributes for that Competitor for each Opportunity.

App Design

Functional

The Salesforce Opportunity entity is extended with SOS components for Snapshot, Influence Map, Competitive Strategy, Value Proposition, Action Plan.

The Salesforce Contact entity is extended with SOS attributes including the Opportunities for which the Contact has been associated via the Influence Map, along with related instance attributes.

Security

The system uses the standard Salesforce security model in this version of development.

The SOS data follows the security and access rules for the Opportunity object to which they belong.

Technical Approach

There are 6 major components which are part of the SOS component.

SOS Components include:

1. SOS Snapshot
2. SOS Influence Map
3. SOS Competitive Strategy
4. SOS Value Proposition
5. SOS Action Plan
6. SOS Print Component

The creation of these components includes development of **Apex classes**, **Lightning Web Components**, **Aura Components**, and use of pre-constructed **JavaScript Libraries**.

Installation Steps

FIRST - Install the SOS for SFDC App from Salesforce AppExchange.

App must be installed for “Everybody” from AppExchange!

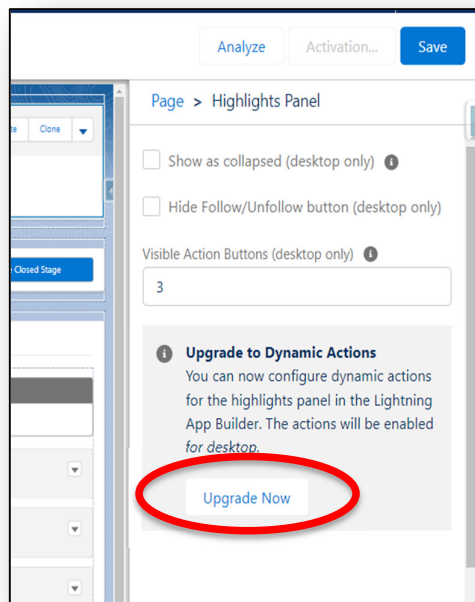
Mandatory One-Time Post Installation Steps

To utilize the full functionality of the SOS for SFDC App, the following one-time actions must be taken **after the App is installed from the Salesforce AppExchange**. Salesforce Admin access is required.

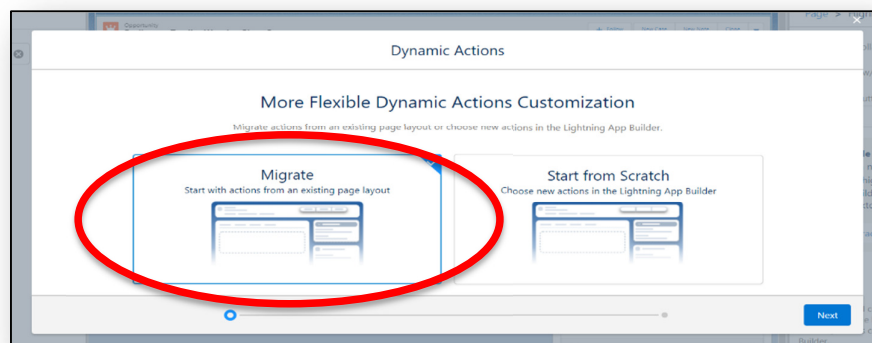
Add SOS Actions to the Opportunity Page:

1. Log into Salesforce as the admin
2. From the App selector in the upper left corner, select Sales
3. Open an Opportunity page (Create a new opportunity if needed or open any opportunity record.)
4. In the upper right corner of the window displaying the opportunity page, select the gear icon, and click on Edit Page.
5. Select the Opportunity Properties box at the top the screen.

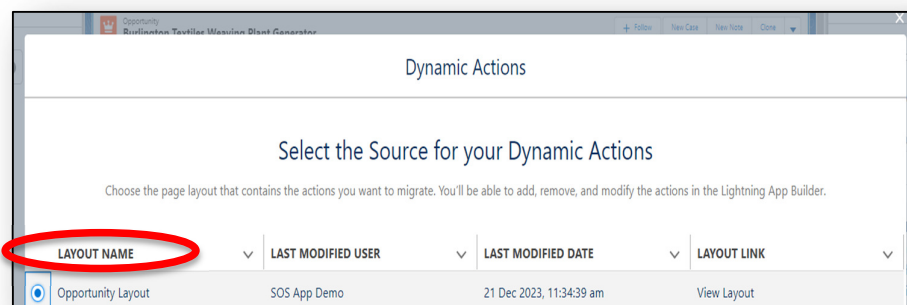
6. The right sidebar will update to look like this:



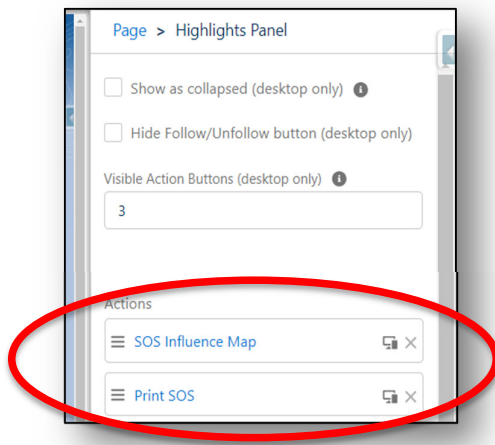
7. Select Upgrade Now in the Dynamic Actions portion
8. Then select Migrate:



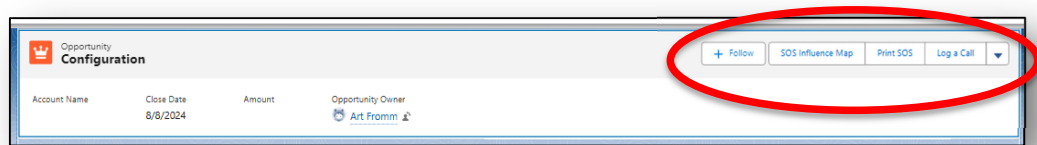
9. Select the Opportunity Layout template



10. Highlight the Opportunity panel at the top of the window, and then on the right side of the page, individually select the **SOS Influence Map** and **Print SOS Actions** from the Actions List and drag each of the them to the top of the list as shown so they will be displayed first.

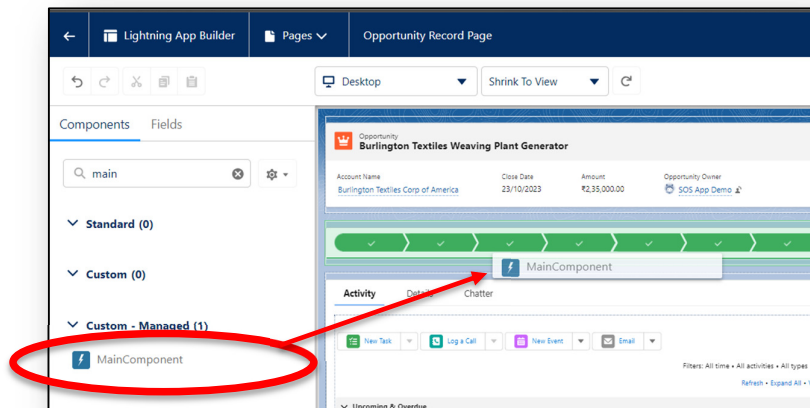


The result:

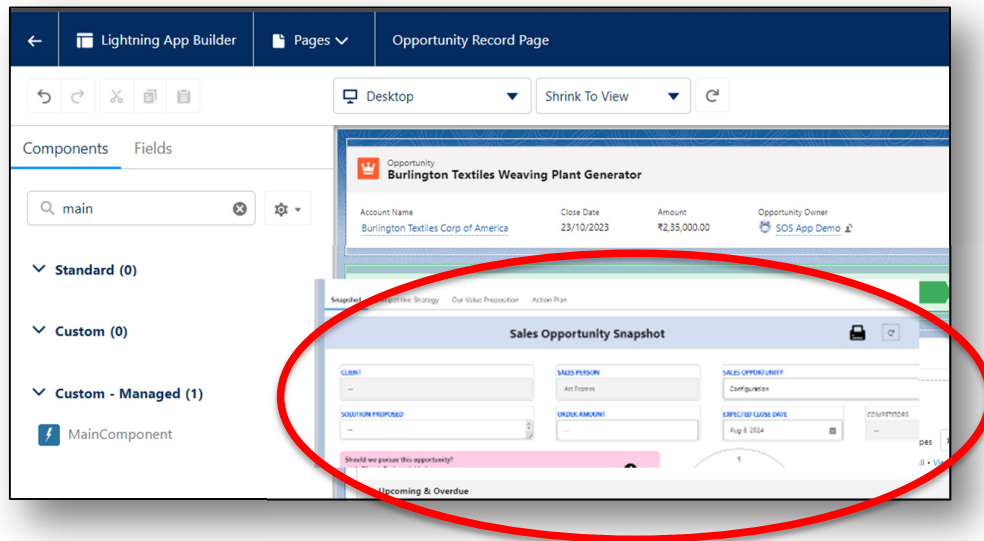


Add the Main SOS component to the record page.

1. Use the component Search box in the upper left corner of the page, to search for “Main Component” and drag it over to the middle part of the screen under the window displaying the Salesforce Stages or wherever you would like it to display in the Opportunity form.



The result:



2. Save the changes, select Activate the Page, and Close

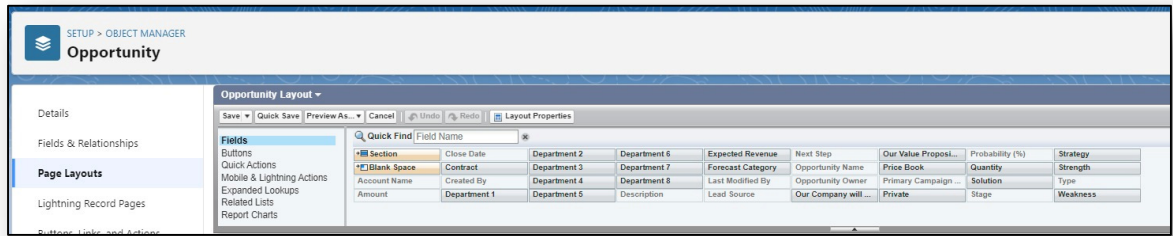
Additional Mandatory Changes Required

Some of the out of the box menu choices in the application will be removed, and several additional tabs will be created, in addition to customizing some of the tabs.

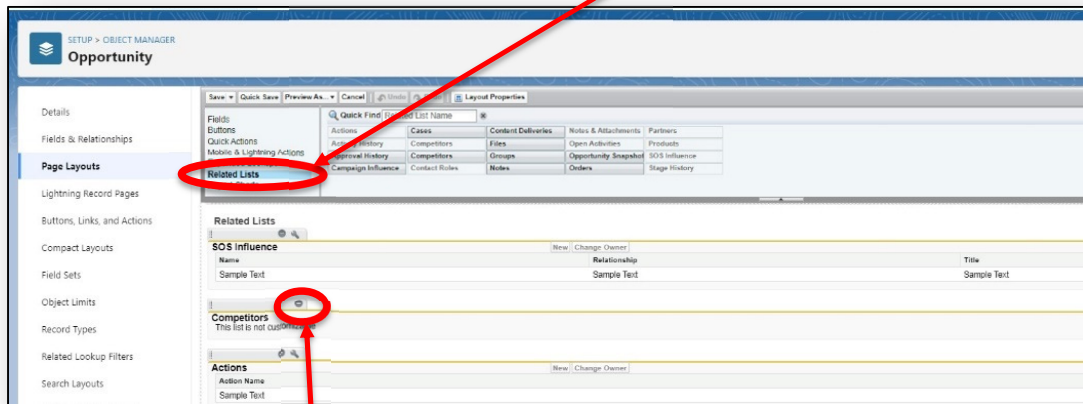
- The Contacts, out of the box Competitor (if installed), and Actions related items in the Opportunity tab will be removed. These relationships are managed by SOS and the results shown in the out of the box tabs could be confusing but worse, if changes are made in these tabs, the SOS data can become corrupt.
- SOS Actions and SOS Competitors tabs will be added to the top menu
- The Contact tab will be modified to include a Related Items tab listing all the Opportunities for which the Contact has been added to the Influence Map
- SOS Competitor tab will be modified to include a Related Items tab listing all the Opportunities for which the SOS Competitor has been added.

Remove Related Items for the out of the box Competitors, Contacts, and Actions from the Opportunity Object

1. On an Opportunity page, use Settings/Edit Object and locate and select the Page Layouts and then select Opportunity Layout.



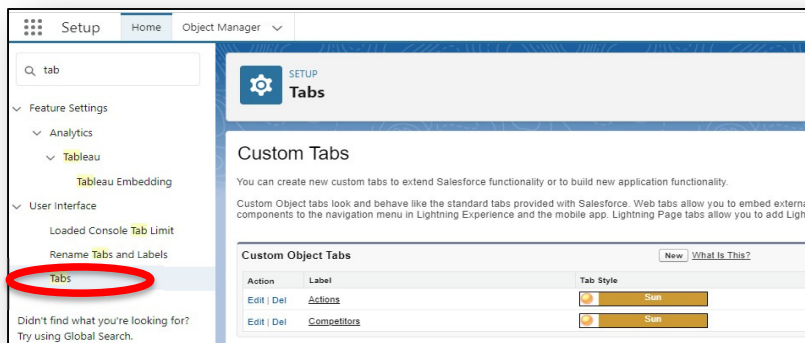
2. From the Page Layout screen find and select Related Lists:



3. Scroll down and remove Competitor, SOS Influence, and Actions tabs if present by selecting the “-“ sign at the top of the tab
4. Select Save at the top to record the changes

Create Custom Tabs for Custom Objects

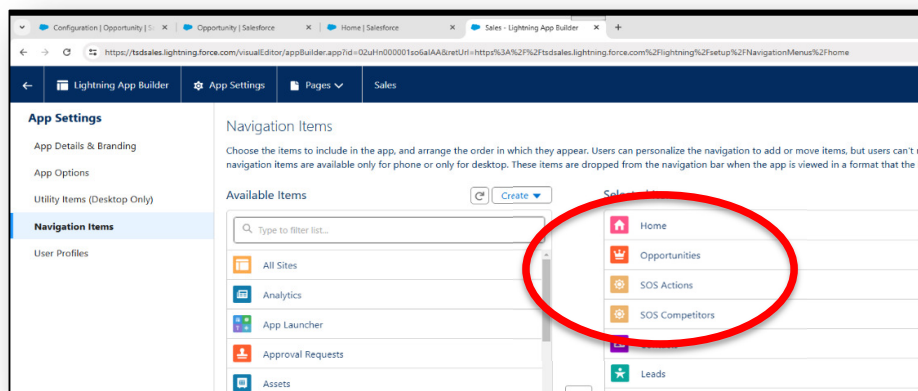
1. Select the Setup Icon in the upper right corner of the Salesforce screen and select Setup
2. Use the Search option to find “Tabs” in the quick find box



3. Use the New button to create two new Custom Object Tabs, one called **SOS Actions** for the object **Actions** using the Sun Tab Style, and another one called **SOS Competitors** for the object **Competitors** using the Sun Tab Style.

Add the SOS Actions and SOS Competitors tabs to the main menu:

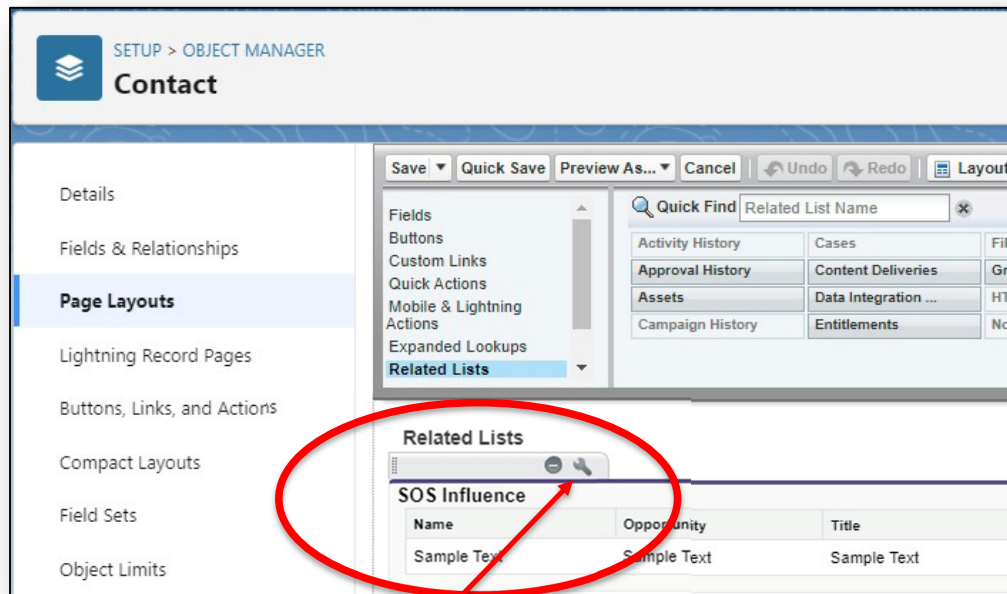
1. Once the tabs have been created, search for App Manager in the Quick Find box in the Setup window.
2. In the list of apps, search for the app your organisation uses (i.e. Sales/LighteningSales) and click Edit from the dropdown button on the right-hand side for your organization app.
3. Once opened for editing, select **Navigation Items on the App Settings** side bar and confirm that the newly created tabs for **SOS Action** and **SOS Competitors** are in the “Selected Items” list (they should be at the bottom), and if not, select them from the “Available Items” list and add them to the **Selected Items** list.
4. Move SOS Actions and SOS Competitors just below the Opportunities item on the Navigation Bar (so that they will appear to the right of the Opportunity pulldown on the main screen).



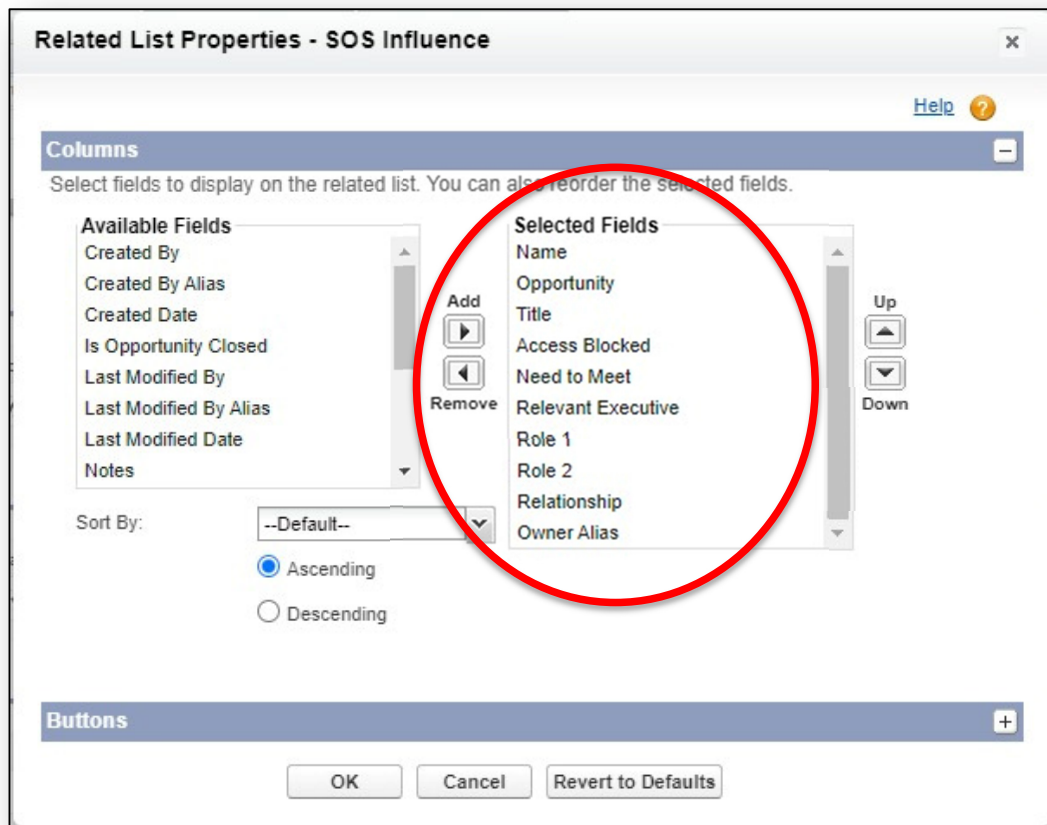
5. Select the blue Save button at the bottom of the screen.
6. If UPDATES DID NOT DISPLAY ON MAIN OPPORTUNITY MENU confirm that the correct app was selected in Step 2 above. If so, use the pencil on main menu bar and select reset.

Set up SOS Opportunities in Related Items for Contact

1. Return to the Object Manager and select the Contact object
2. Select Page Layouts and select Contact Layout
3. Select Related Lists and find the SOS Influence tab. Select the top of the tab and drag the tab to the top of the Related Lists Section:



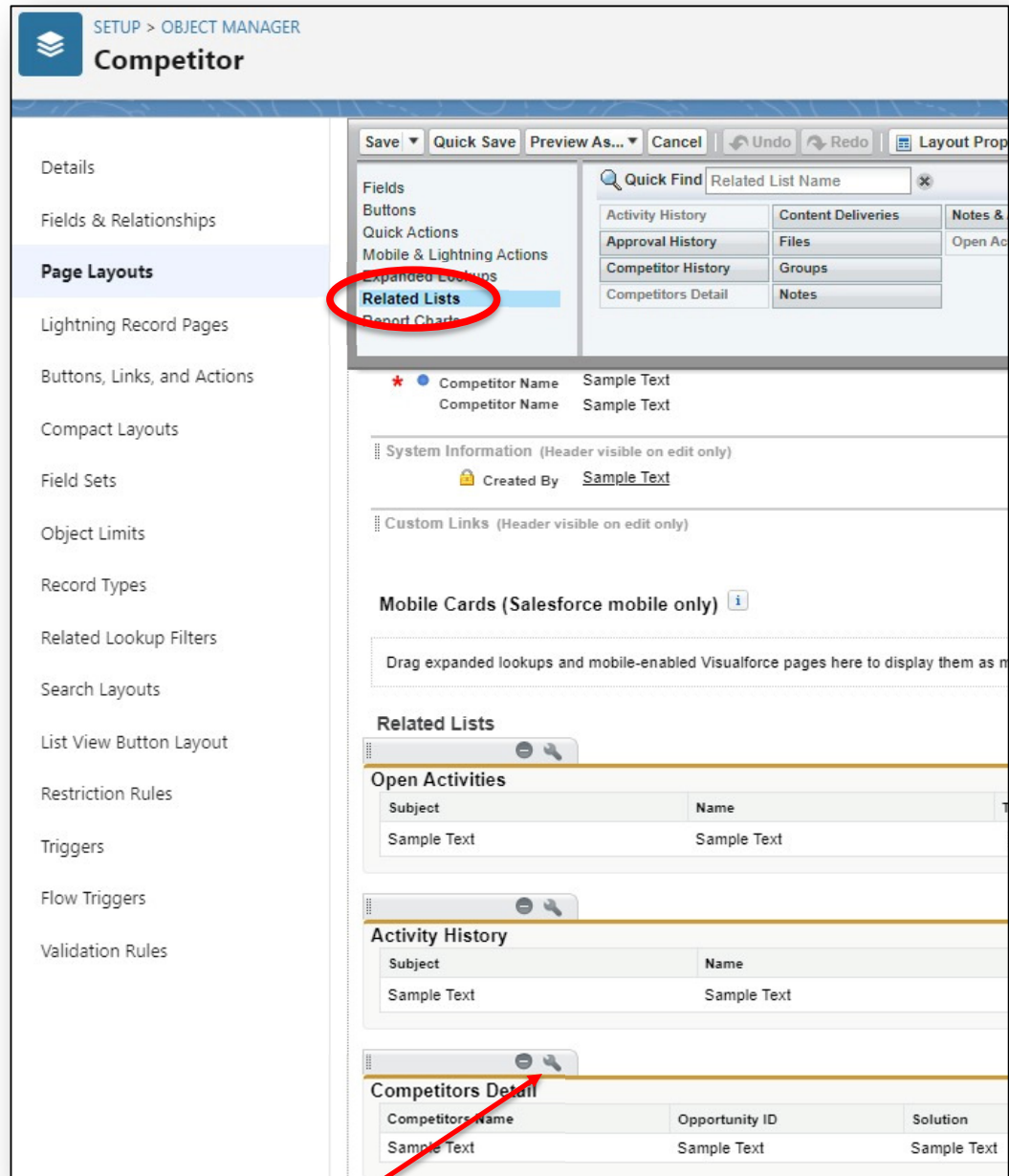
4. Select the Edit (wrench) icon on the SOS Influence Related List
5. Move the Available fields to Selected Fields to look like this:



6. Select OK and Save the Contact Object page changes

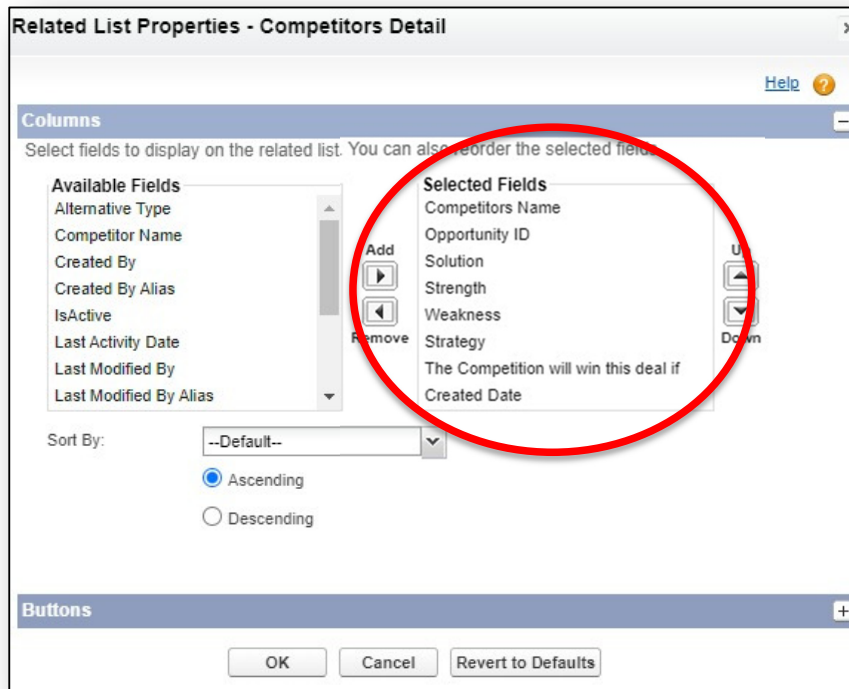
Set up SOS Opportunities in Related Items for SOS Competitor

1. Return to the Object Manager and select the SOS Competitor Object
2. Select Page Layouts and select Competitor Layout
3. Select Related Lists:



4. Select Edit (the gear icon) from the Competitors Detail Related List tab.

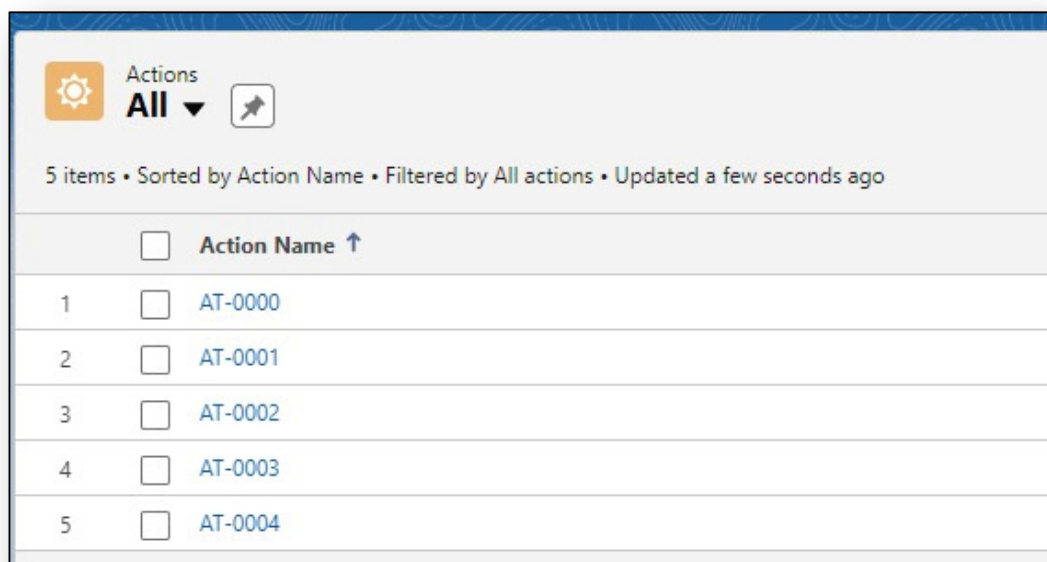
5. Move the Available Fields to Selected Fields to look like this:



6. Select OK and Save the SOS Competitor Object page changes.

Modify SOS Actions Tab to show all SOS Actions Field – UPDATE TO INCLUDE RECENTLY VIEWED – UPDATE TO ADD OPPORTUNITY RECORD

1. Open an Opportunity record and select the SOS Actions Tab then select All:



2. Select the gear icon on the **All SOS Actions** form and select “Select Fields to Display”
3. Select the following fields from “Available Fields” and move them to “Visible Fields” listed as follows:

Select Fields to Display

Available Fields	Visible Fields
Created By	SOS Action Name
Created By Alias	Opportunity
Last Activity Date	Subject
Last Modified By	When will it happen?
Last Modified By Alias	Is CRM User?
Last Modified Date	Owner Alias
Owner First Name	Who will do it?
Owner Last Name	Strengthen
Record ID	Obtain
User	Soften
	Status
	Created Date

Cancel Save

4. Save the Changes

SOS is now be configured and ready for use!

Uninstalling the App

WARNING – As with all Salesforce Apps, if the App is uninstalled all SOS tables with all user and opportunity data will be deleted.

Also, SOS flows will need to be disabled and other warning messages will appear if any SOS fields were used elsewhere in the system.