LEAPING FOX

EXPRESS CONSOLE

Installation Guide v3.2

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PREREQUISITES

Supported Salesforce Editions

The supported editions for Express Console package are:

- Enterprise Edition
- Unlimited Edition
- Developer Edition

My Domain Required

The Express Console requires a My Domain in the org to access the Lightning Web Components framework on which the Express Console is based.

Your Salesforce URL has My Domain set up if it has a word pertaining to your company in the main Salesforce URL (e.g. **Acme**.lightning.force.com). If not, refer to **Appendix 1** at the end of this document for instructions on how to set one up.

INSTALLATION & CONFIGURATION PROCESS

There are several steps to install and configure the Express Console. If you are familiar with the first two, you can skip ahead by clicking on any of the items below:

1. Installing the Managed Package
2. Manage User Licenses in the Installed Package
3. Permission Set Configuration
4. Object Permission Configurations
5. Express Console User Tab Configuration

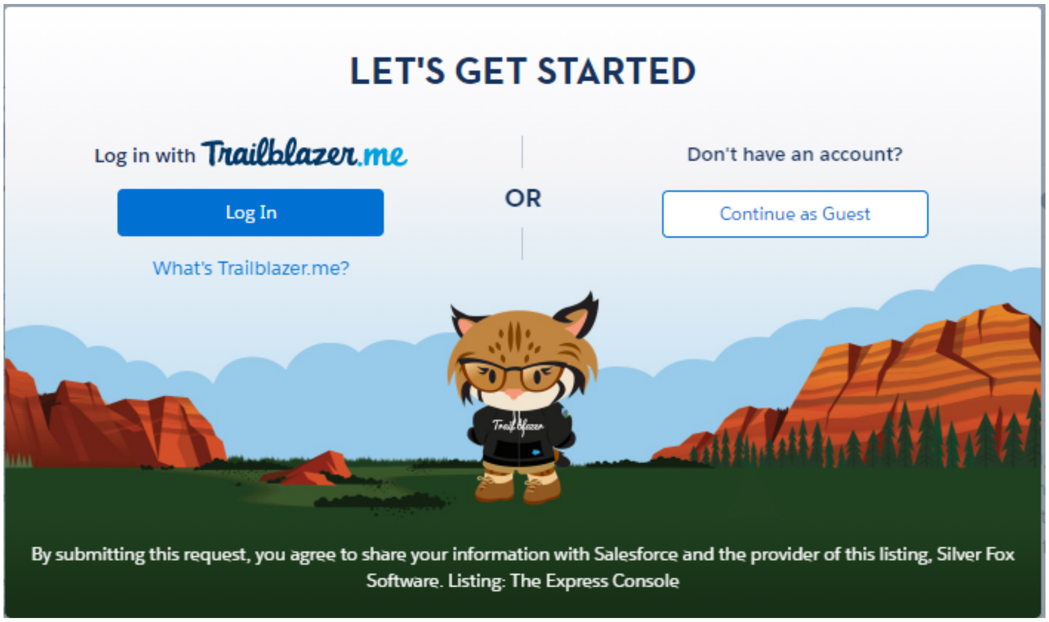
Installing the Managed Package

Follow the steps below to install the Express Console managed package on your Salesforce org:

1. To download the Express Console from the AppExchange, click on this URL: https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3u00000OMs0VEAT

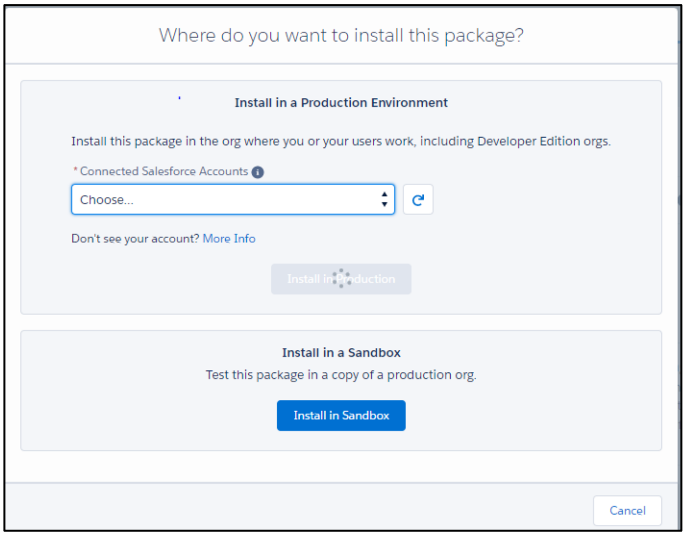
2. Click on "Get It Now" button.

3. It will redirect you to a screen with two options. If you already have a Salesforce account then click on the "Log In" button. If you don't have a Salesforce account, then click on "Continue as Guest".



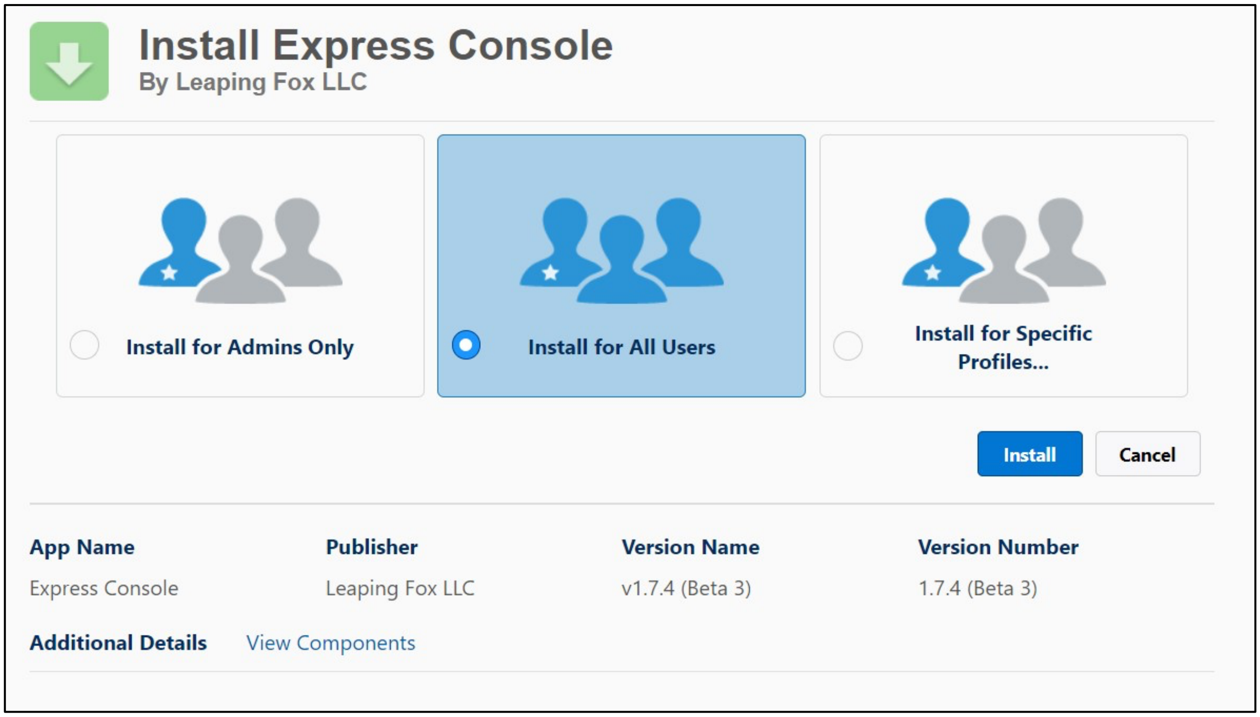
When you click on "Log In" it will redirect you to a screen where you click on Salesforce and enter the credentials for the org where you want to install the package.

Then another pop-up will be displayed, where the user name entered in the previous step will be displayed.



1. Click on the "Install in Production" or "Install in Sandbox" to choose where you would like to install the app.
2. A "Confirm Installation Details" pop-up will be displayed. Click on the check box to review Terms and Conditions and then click on "Confirm and Install" button.

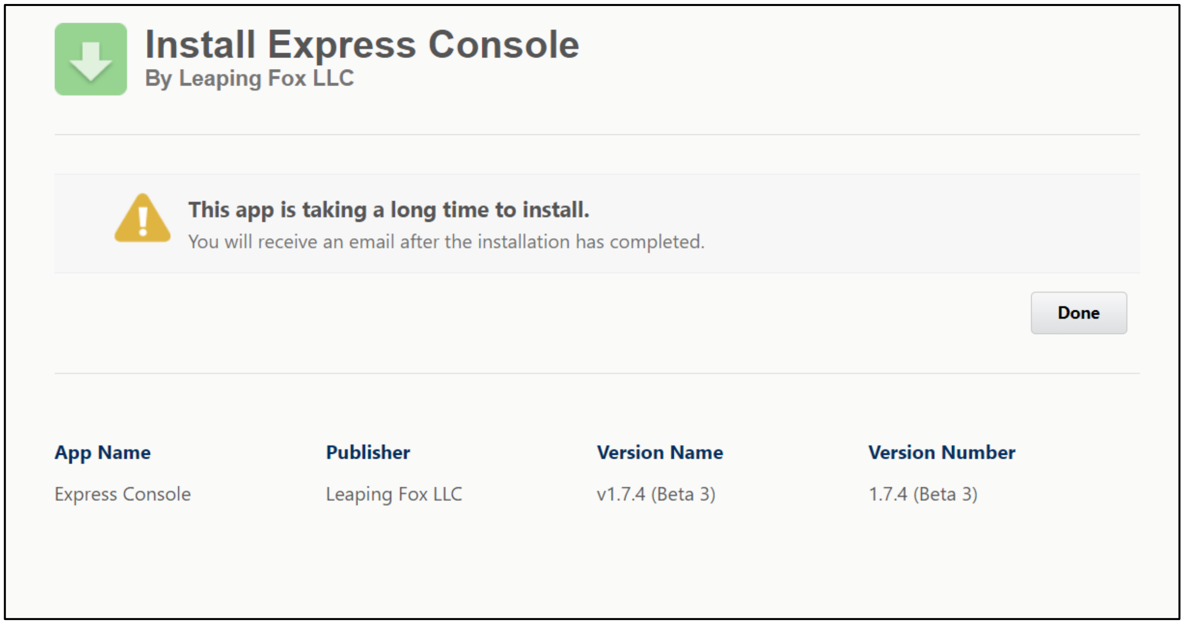
3. After successful login to your Salesforce org, you will be redirected to the installation screen.



1. Select "Install for All Users" and check the box to agree to terms and conditions.
2. Click on the Install button.

Note – "Install for All Users" will give Express Console system access to all users, but you will still need to provision individual users in a later step according to the number of users licensed.

You will be navigated to the Installed packages screen where the "Express Console" will be shown as installed. Note that you need to refresh the page to see the newly-installed package. Once the installation is finished, a success message will usually be shown.

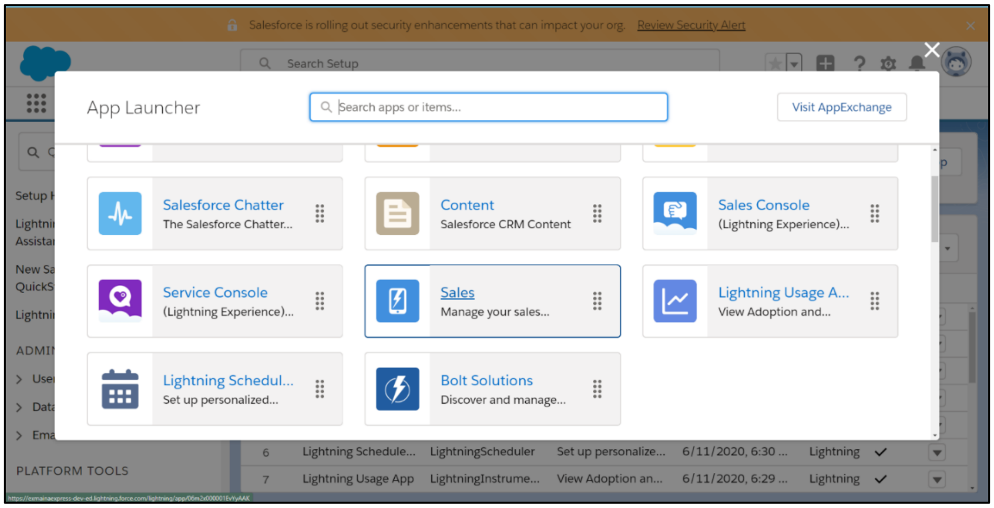


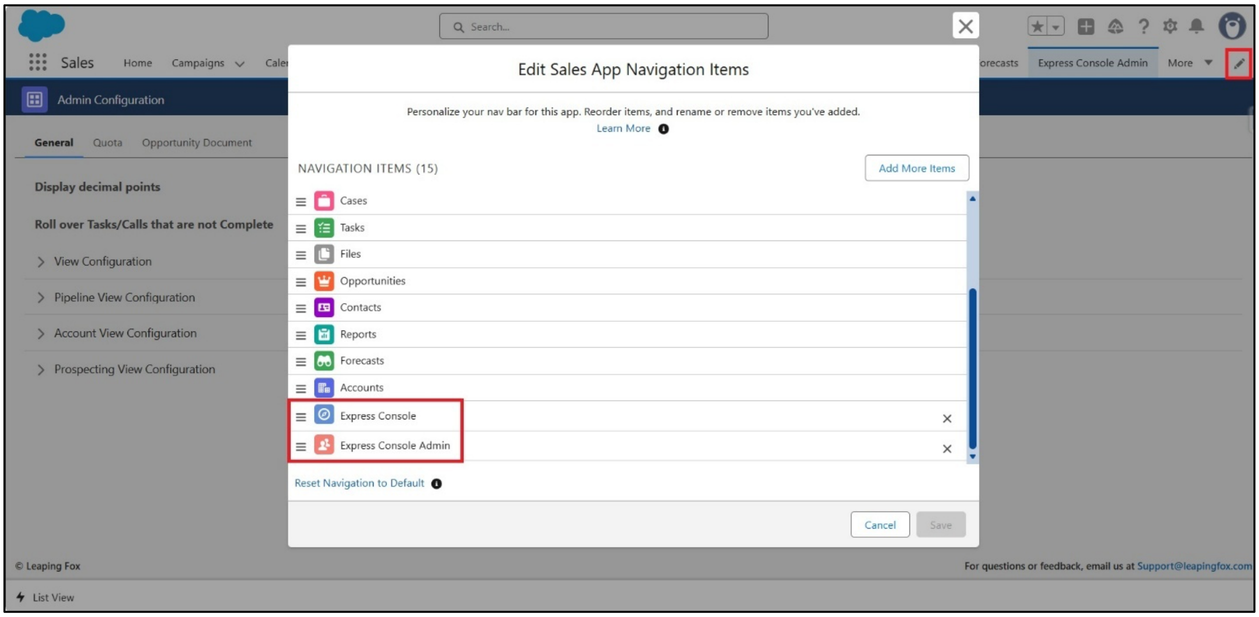
Sometimes, however, it shows a message that the Package Installation is taking a long time to install. This is common on the AppExchange so you can just close this screen, and Salesforce will notify you via email once the installation is complete. Click on Done.

Express Console Configuration

The System Administrator will need to position the Express Console and Express Console Admin tabs on their Salesforce page:

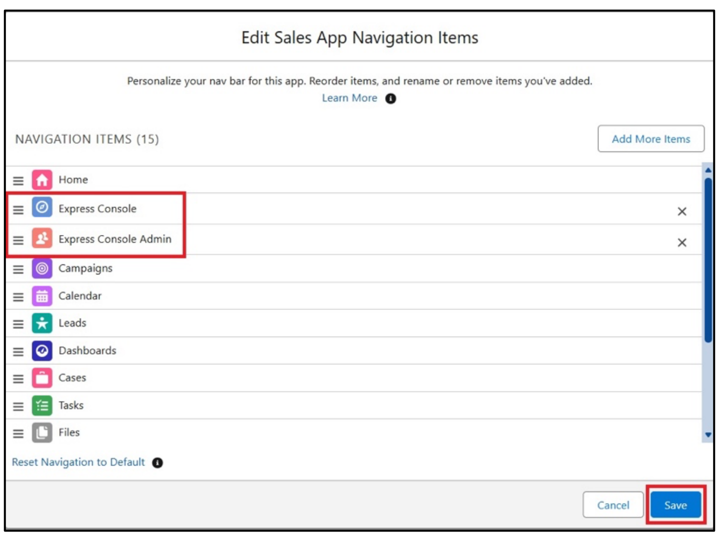
a) Click on the App Launcher.
b) Select the Sales application.





c) Select the pencil icon to edit the Lightning Navigation Bar. The list of navigation items will appear.

d) Scroll down to the bottom to locate the Express Console and Express Console Admin tabs.



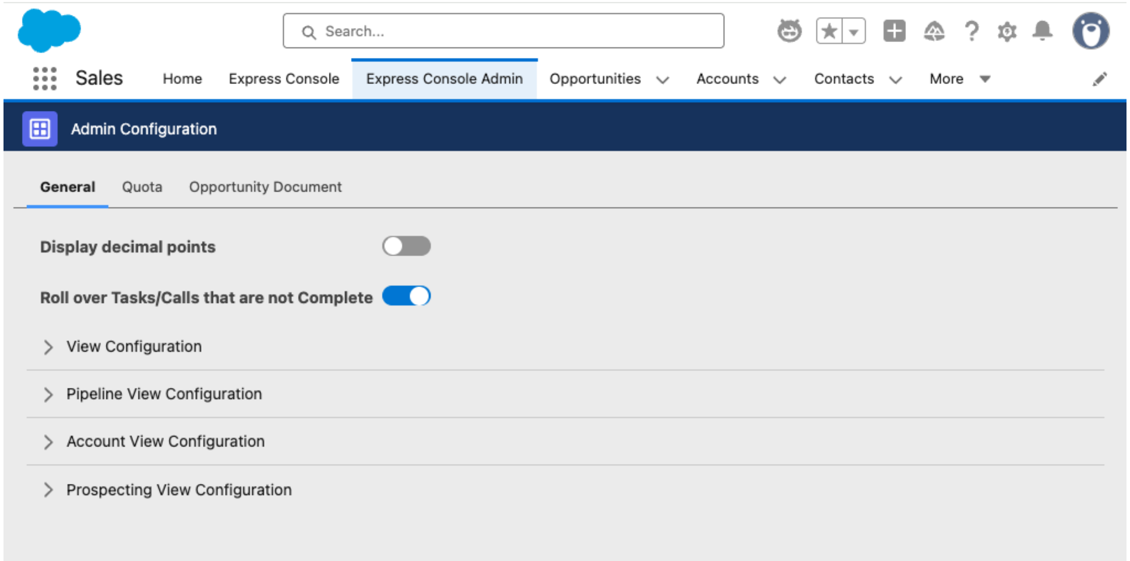
e) Click the hamburger icon (three horizontal lines) and drag the two tabs to the desired position on the navigation bar.

f) Click Save to apply the changes.

The Express Console and Express Console Admin tabs will appear in the Lightning Navigation bar.

g) Click on the Express Console Admin tab to display the Admin screen.

General Configuration



Display Decimal Points

Most Salesforce orgs display decimal points even though this level of precision is not central to selling or forecasting products. So the Express Console defaults to not display decimal points in order to make screens more readable, regardless of the master Org setting. Amounts will be rounded up from the .50 point, and rounded down for lower amounts.

The Default setting is “Off”. If you need to display decimal points, change the click the button to change the setting to “On”.

Roll over Tasks

The Express Console has the option to retain or “roll over” Tasks from the previous day that were not marked “Completed” in the current day. The system changes the date at midnight in the local org time to the next day to accomplish the rollover.

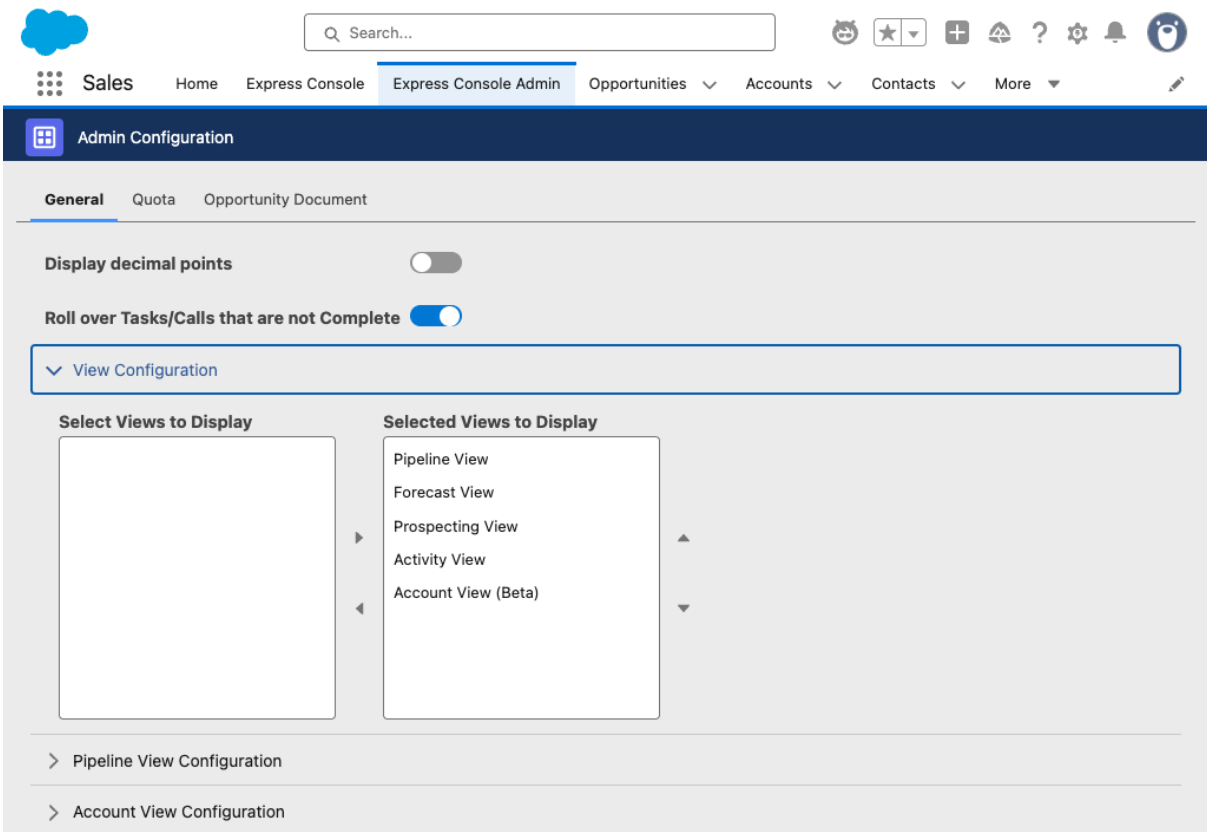
Most users prefer to retain Tasks/Call Tasks from the previous day that were not completed, so the default setting for the Express Console is to roll them over.

Events do not roll over since they automatically reflect calendar items from the new Current Day.

Select Views

The primary drop-down at the upper left corner of the Express Console allows the user to choose which of the five screens of the Express Console is displayed.

In the Admin Setup, the “View Configuration” option allows the Admin to select the desired Views and their order in the drop-down.



All the Views are selected by default in “Selected Views to Display” in the following order:

- Pipeline View
- Forecast View
- Activity View
- Prospecting View
- Account View (Beta)

The order of the Views displayed can be changed by clicking on the ‘View’ name and clicking on the up or down arrow.

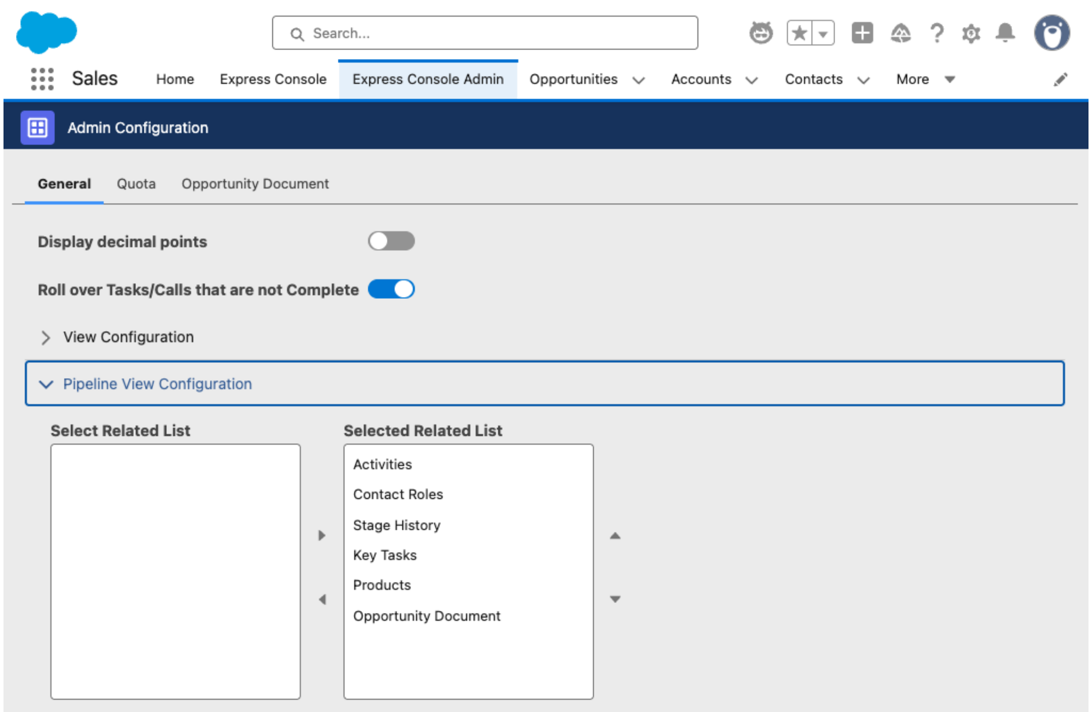
A View may be removed from the list by clicking on it and then the right arrow.

Changes to View Selection will be auto-saved.

Pipeline View

Related Lists

You can select which Related Lists will display in the Pipeline View, as well as their order of appearance on the page.



The Related Lists for the Pipeline View are displayed in the "Selected Related List" by default in the following order:

- Activities
- Stage History
- Key Tasks
- Contact Roles
- Opportunity Document

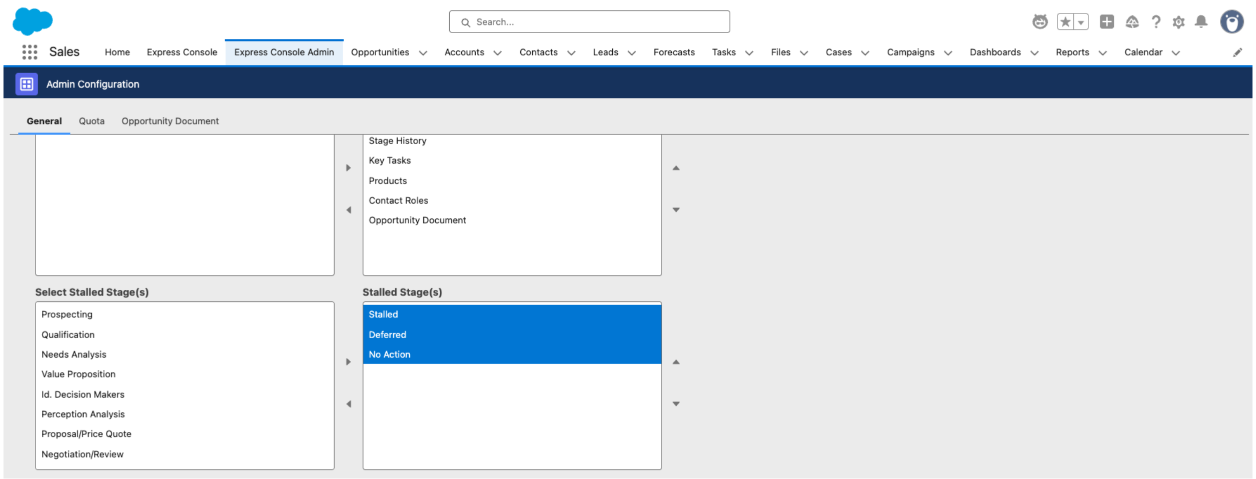
The Additional Information section is fixed at the top of the Pipeline View.

Any of these Related Lists can be removed from user view by clicking on them and then the left arrow, and the setting will be auto-saved.

The order of the Related Lists displayed can be changed by clicking on the 'Related List' name and clicking on the up or down arrow.

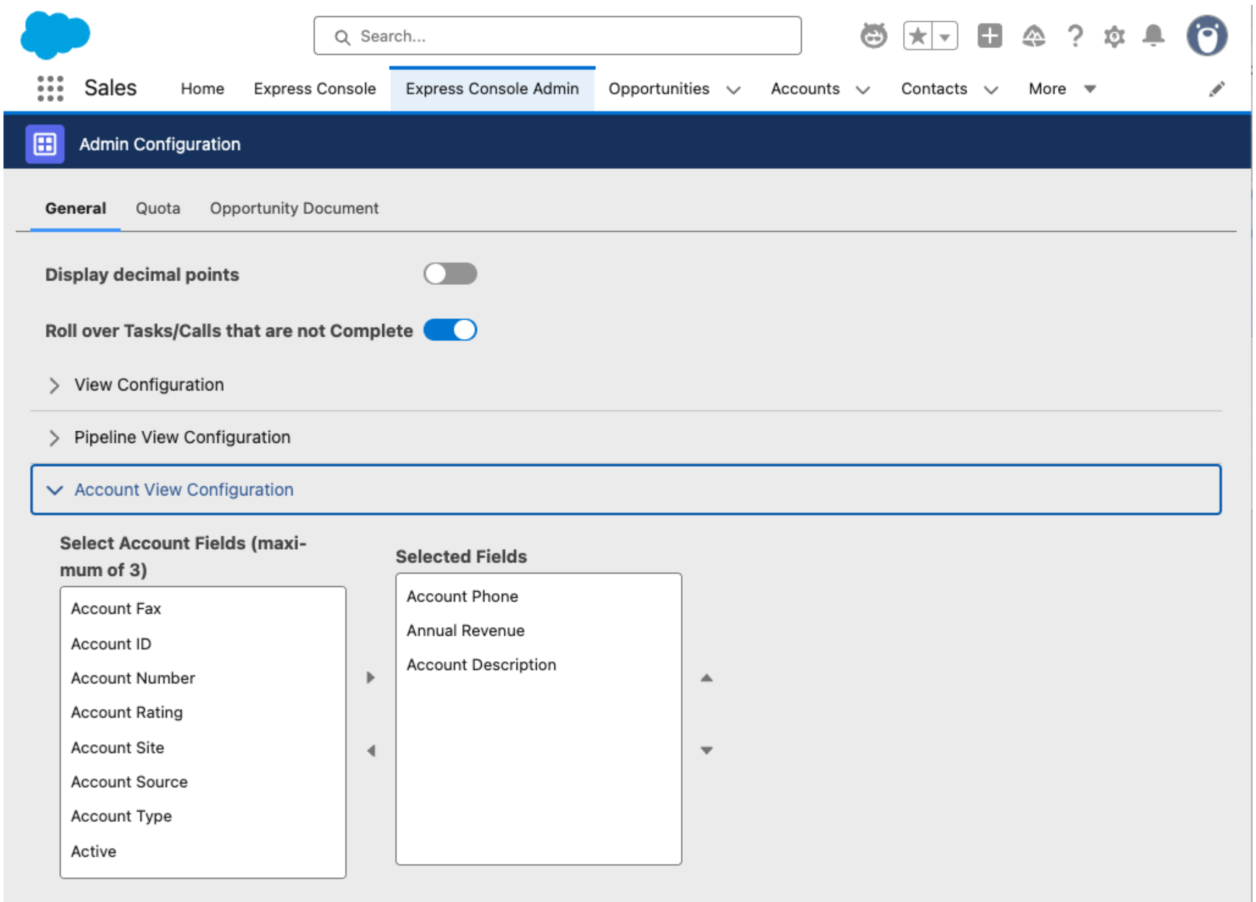
Select Stalled Stages

Since Salesforce does not have a standard Stage for Stalled Opportunities, some organizations have created custom names for Opportunities that are not moving forward, e.g. Stalled, Deferred, Waiting, etc.



The Admin user can pick from the standard org list of Stages and assign the appropriate ones to the “Stalled” category, which is then active for filters in the Pipeline and Forecast Views.

Account View



The Express Console Account View (Beta) allows the admin to choose which three Accounts fields which will be displayed in the left panel.

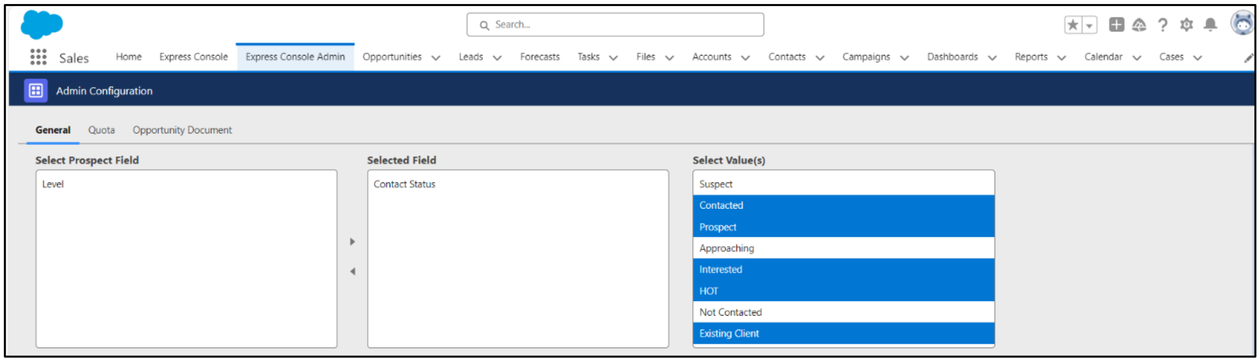
Select Account field from the list by clicking on them and then the right arrow to move them to "Selected Fields."

The order of the fields displayed can be changed by clicking on the field in 'Selected Fields" and clicking the up or down arrows.

You can select only three fields at a time. Fields must be removed from "Selected Fields" if there are already three displayed in order to add a different field. To remove a field select it and click the left arrow.

All configurations and changed values will be auto-saved.

Prospecting View



Select Prospect Field

Salesforce also does not provide a standard field to describe the status of a Prospect (either Contact or Lead). The Express Console Prospect View has a filter that requires drop-down values, so a field must be chosen for this filter.

Selected Field

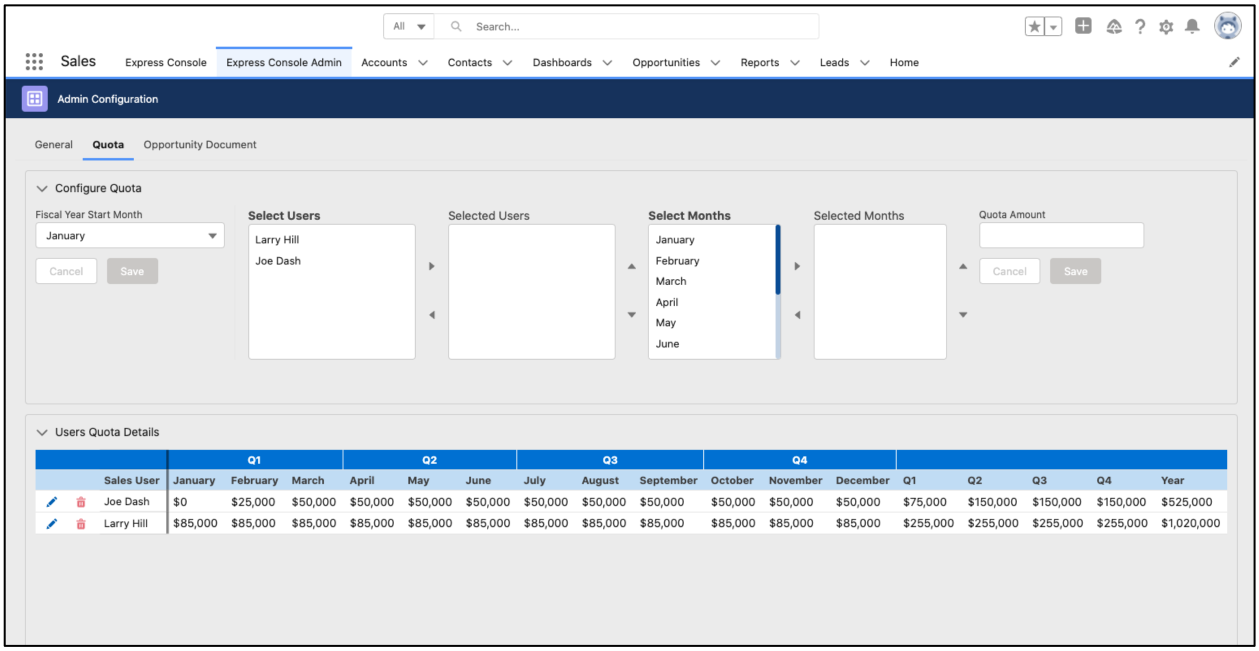
The Admin user chooses the most relevant Contact field to display its members for the drop-down.

Once your desired field is selected it will display its various values in the “Select Value(s)” section. Select one field at a time and click the right arrow to move them to “Select Value(s)”. Use the reverse connect arrow to remove a selected field

Select Value(s)

Click on the values to select them for the Prospect View filter. Selections will be highlighted in blue and auto-saved.

Quota Configuration



Quota

Quotas that have been set in the standard Salesforce Org cannot be accessed by the Express Console due to limitations in the Lightning Web Components API. So we have provided an easy way to mirror them.

The Salesforce admin can select one or more sales users and:

- Select the first month of the Fiscal Year
- Select User (or Users with common quota numbers)
- Select Month(s) to assign the user quota
- Add/Edit quota amount

On Save, the financial year calculation logic will be added to the User Quota Details table, which displays both Quarters by Month and Quarter/Year totals.

Fiscal Q1 will start from the "Initial Quota Month" and include the following two months; e.g. if "Initial Quota Month" is set as February, then Q1 will be February, March, and April. Q2 will be May, June, and July, and so forth.

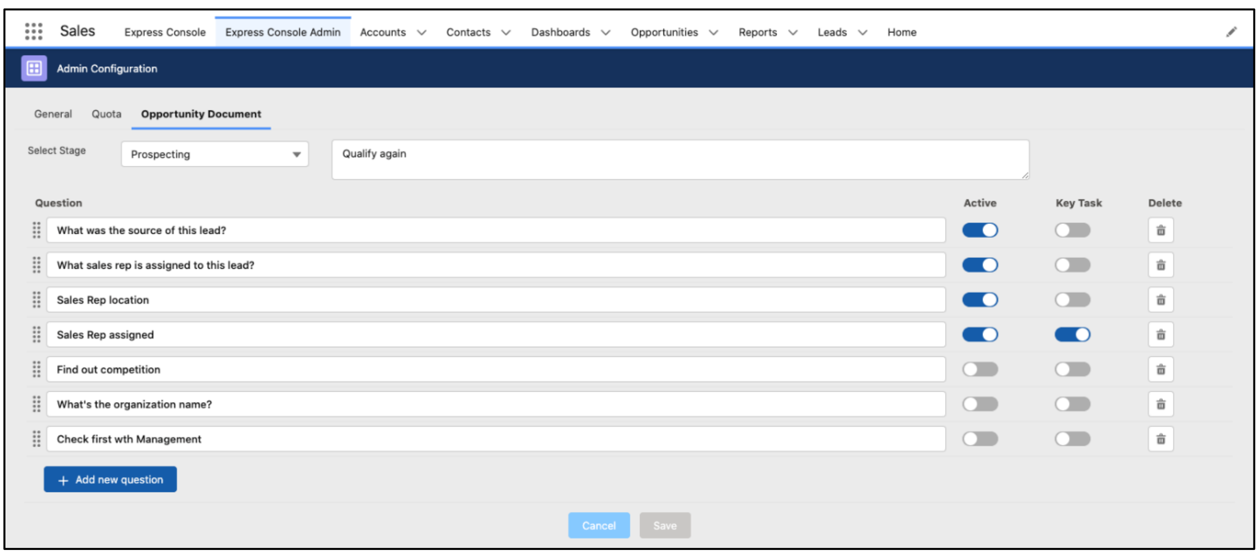
These settings will enable calculation of Totals in the bars at the bottom of the Standard and Forecast Views, giving the sales user immediate feedback on their periodic quota and attainment as they make changes to an Opportunity Forecast amount, Probability, or Close Date.

User Quota Details

- Admin users can edit individual sales user data in the "User Quota Details" section by clicking on the pencil icon
    - One inline edit is allowed at a time
    - One record can be deleted at a time
    - Sales User Name is read-only in this section
- For ease of editing large numbers of sales users, each amount field in the table has a tool tip with the user's name and month
- User Quota Details is collapsible to enable large lists of Sales Users in the top section
- The table is set to list names alphabetically, in descending order.

Opportunity Document

The Express Console provides this facility for the admin to create a custom document that reflects the Stages from the org's Sales Path, as well as any questions sub-items for each Stage, including input sections for the user to fill.



The Opportunity Document will display sales Stages from the org settings. The Admin user can then configure Sales Path questions for all Opportunities by stage.

Configuration Process:

- Select a Stage
- Add Description in the field to the right of Stage (optional)
- Add a new Question via the blue button
- Select whether the Question is Active or Inactive
- Designate Question(s) as Key Task(s)
- Set the order of Questions in each stage via drag-and-drop
- Delete a question with the Trash icon at the far right

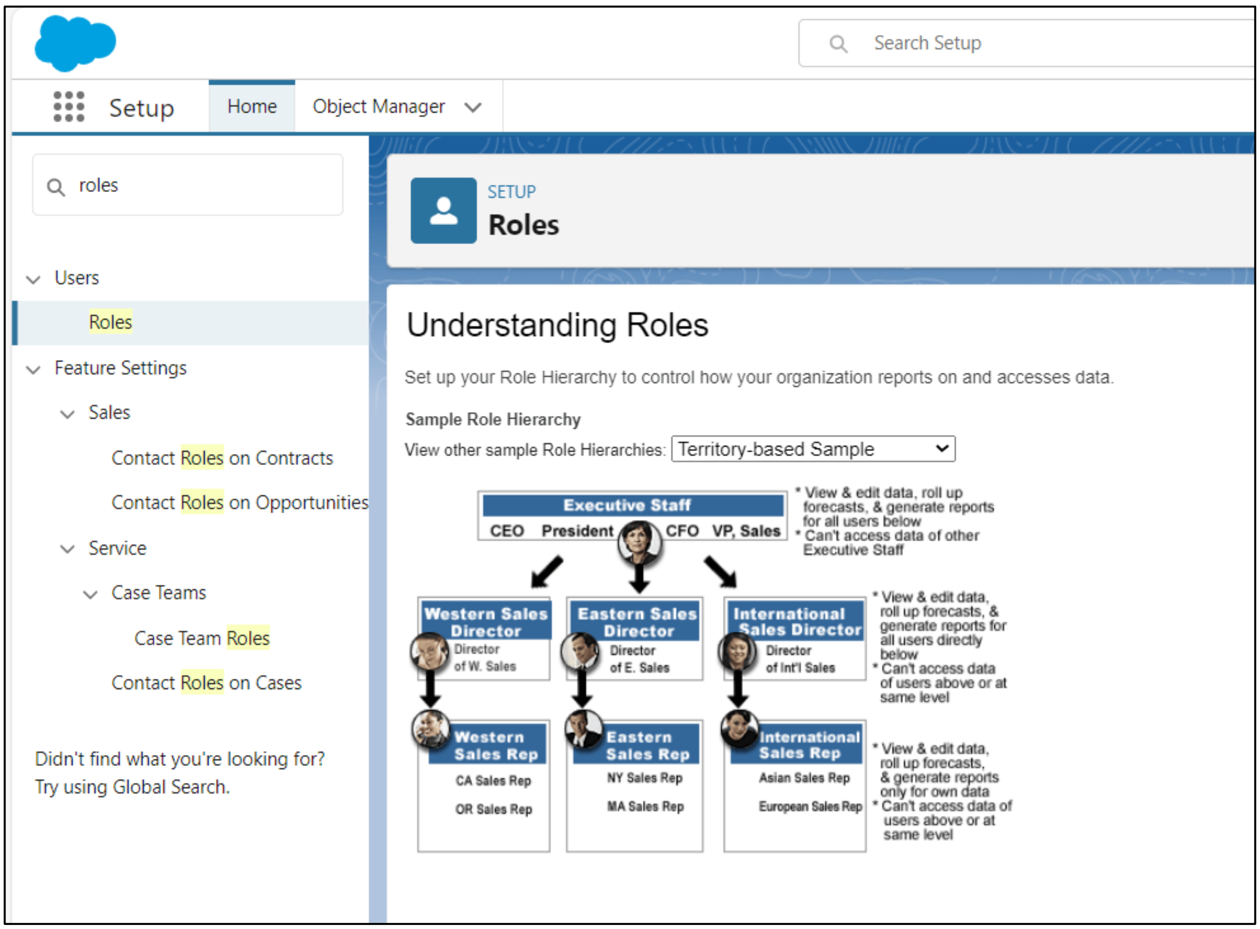
Opportunity Document Settings

- Active/Inactive: A Question can be set to inactive as an alternative to deleting it
    - Inactive Questions can also be dragged to the bottom of the list
- Key Task: these Questions appear both in the Key Task section of the Opportunity Detail panel and at the bottom of the list of Questions in each section of the Opportunity Document
- Delete: permanently deletes a question
- Caution: user data input will be lost if questions are deleted, and hidden if Questions are set as Inactive.

SET UP MANAGEMENT HIERARCHY

The Express Console utilizes Management Hierarchy Roles in the Salesforce org to customize the various Views of the application. Users who are set up as Managers in the org (i.e. have designated direct reports) will be able to select one or more of the users that report to them for the various Views. (By default, the setting is to "All" direct reports so that manager see their entire direct reporting teams).

If you have not set up Roles in your org, you may do so in the following steps:



Access the Role Setup

1. Navigate to Setup (click the gear icon in the upper-right corner).
2. Search for "Roles" using the Quick Find box in the left-hand sidebar.
3. Select Roles under Users.

Create the Management Hierarchy

1. Click Set Up Roles.
2. If you have an existing hierarchy, click Edit next to the desired structure. Otherwise, click Add New Role.

Example for basic Sales Management Hierarchy:

- Sales Manager: The top-level manager needs a consolidated view of all direct reports.
- Sales Rep: The individual team members reporting to the manager.

3. Enter the following key fields for each role:
   - Role Name (e.g., "Sales Manager," "Sales Rep")
   - Parent Role (assign "Sales Manager" as the parent for "Sales Rep")
4. Save your changes.

Assign Roles to Users

1. Go to Setup > Users.
2. Select the user you want to assign a role to.
3. Click Edit on their user profile.
4. Select the appropriate Role (e.g., "Sales Manager" or "Sales Rep") from the drop-down menu.
5. Save your changes.

Enable Role Filters for Views

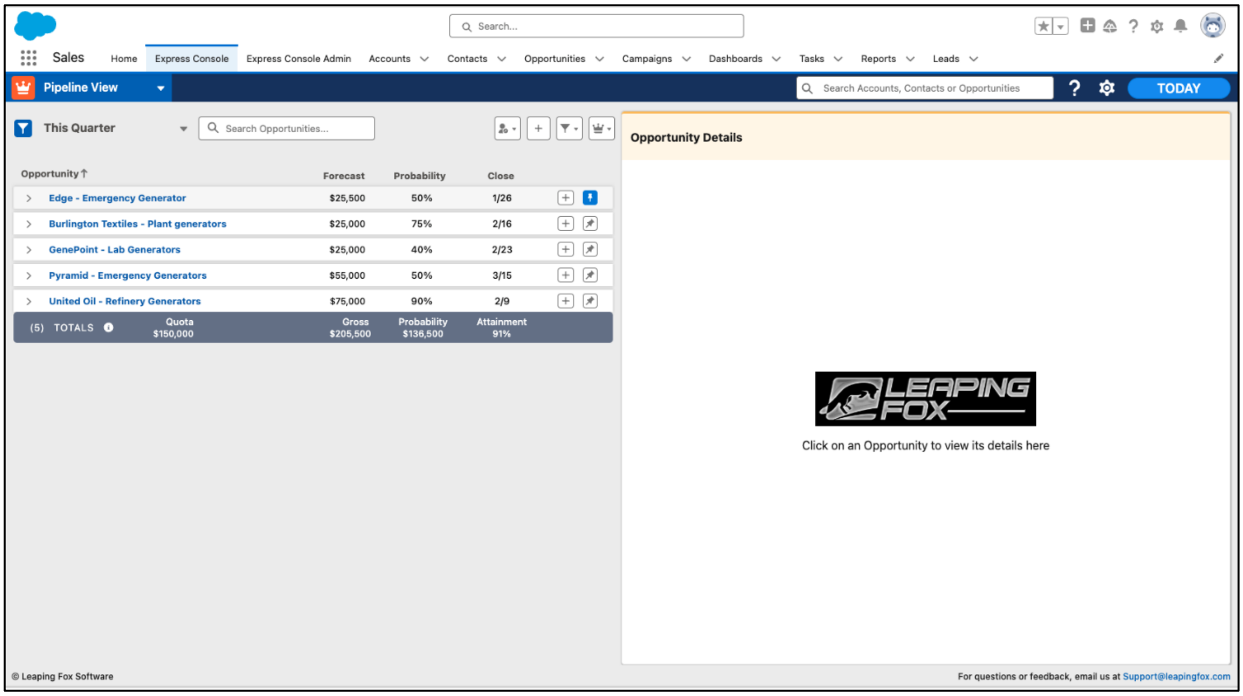
1. Add a filter for Role or User Role in the relevant List Views or Reports.
2. Ensure the appropriate roles are selected to customise the view according to your hierarchy (e.g., managers can see aggregated reports across reps).

SALES USERS

After successfully logging in, the Sales user will see the Express Console tab in the position designated by the Admin. The user can revise the placement of the Express Console tab via the Edit pencil icon on the right side of the Lightning Navigation bar (where the Accounts, Contacts and Express Console tabs are located).

The Express Console will default to the Pipeline View below.

Refer to the User Guide located in the Help ("?") icon for instructions on how to use the Express Console features and functionality.

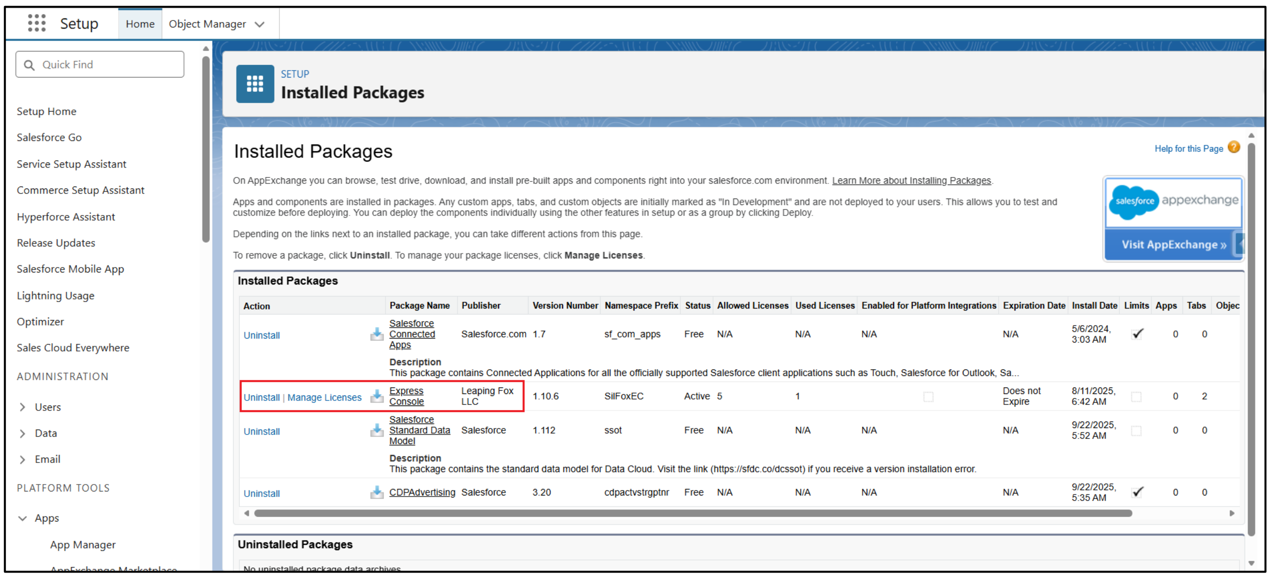


CONFIGURING EXPRESS CONSOLE FOR FIRST USE

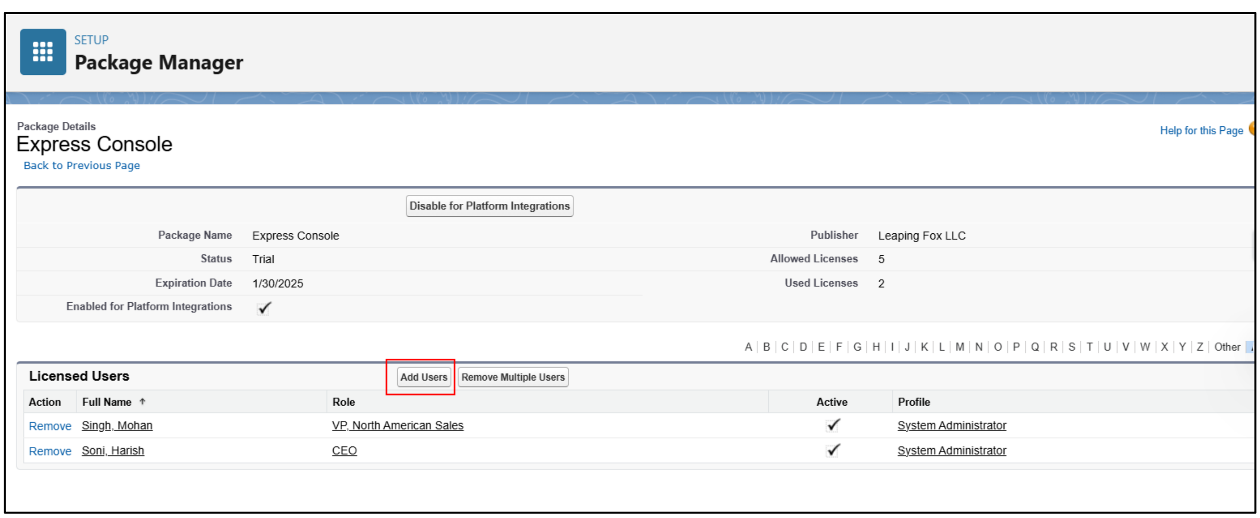
To make the Express Console available to selected Sales users, as well as the System Administrator, follow the steps below.

Manage User Licenses in the Installed Package

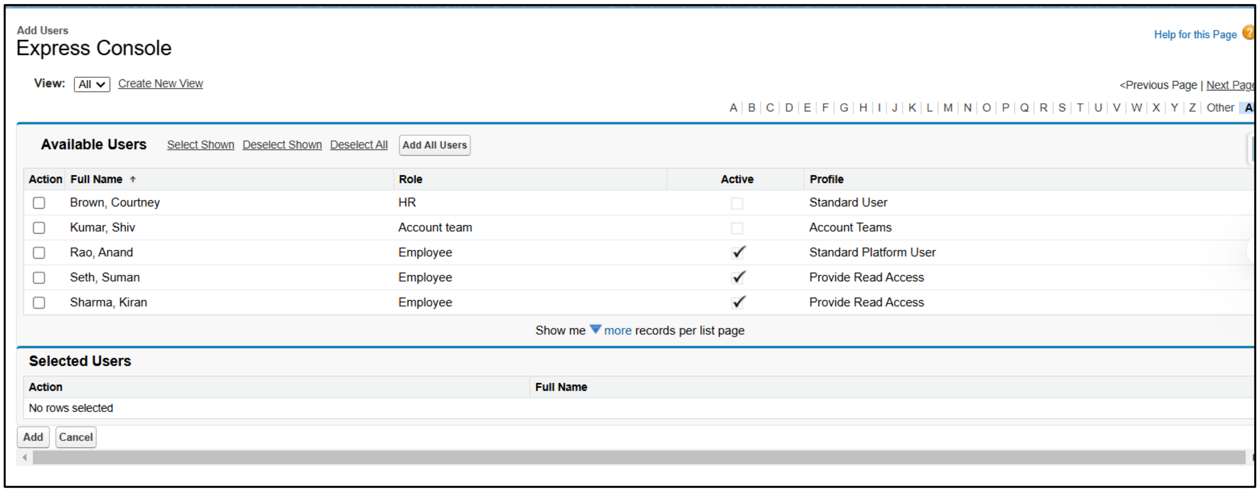
To view the newly-installed package details navigate to the Installed Packages section in Setup and select "Manage Licenses" for the Express Console.



The Admin user will be redirected to the 'Package Manager' screen. A list of Licensed Users who are permitted to use the Express Console will be displayed.



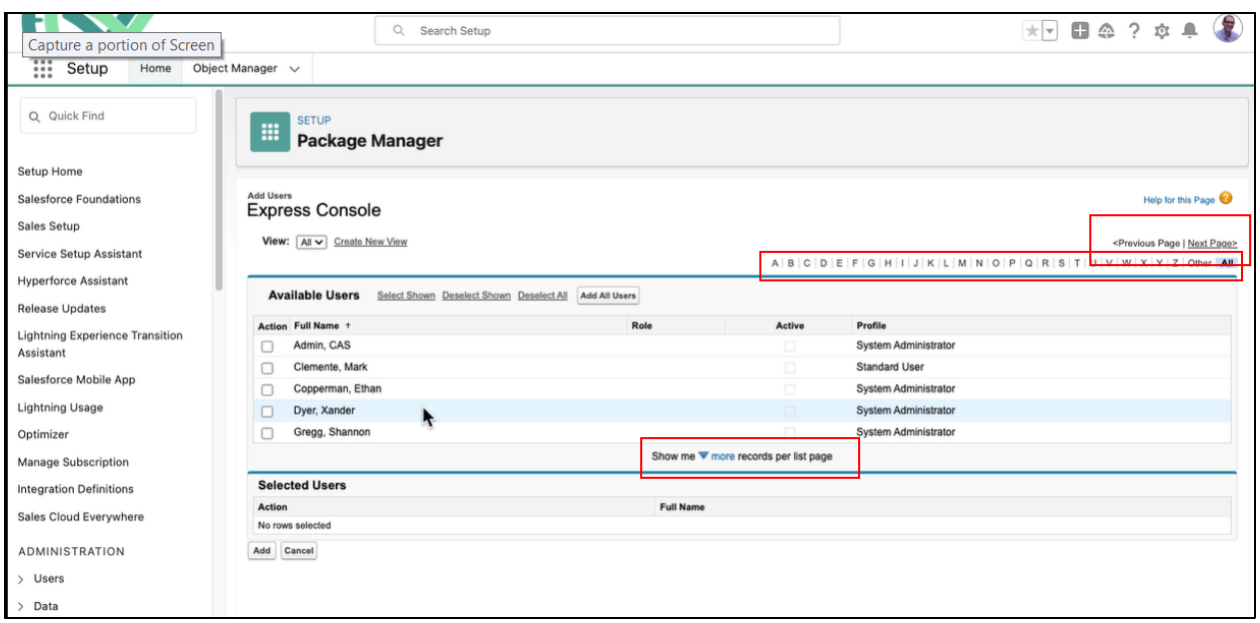
Click on “Add Users” to grant them access to the app. Users who are not added here will not see the Express Console in the App Launcher.



Note: While selecting users if you cannot find the required users, click on:

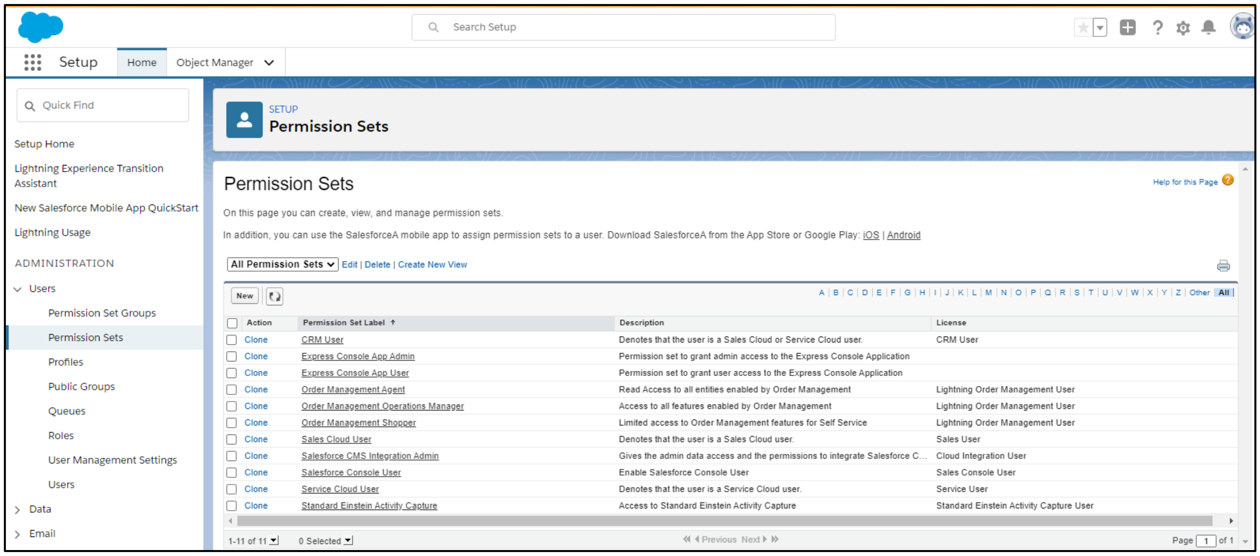
- Previous/Next page
- The first letter of the user’s last name
- Show more records at the bottom

as highlighted in red in the screenshot below.



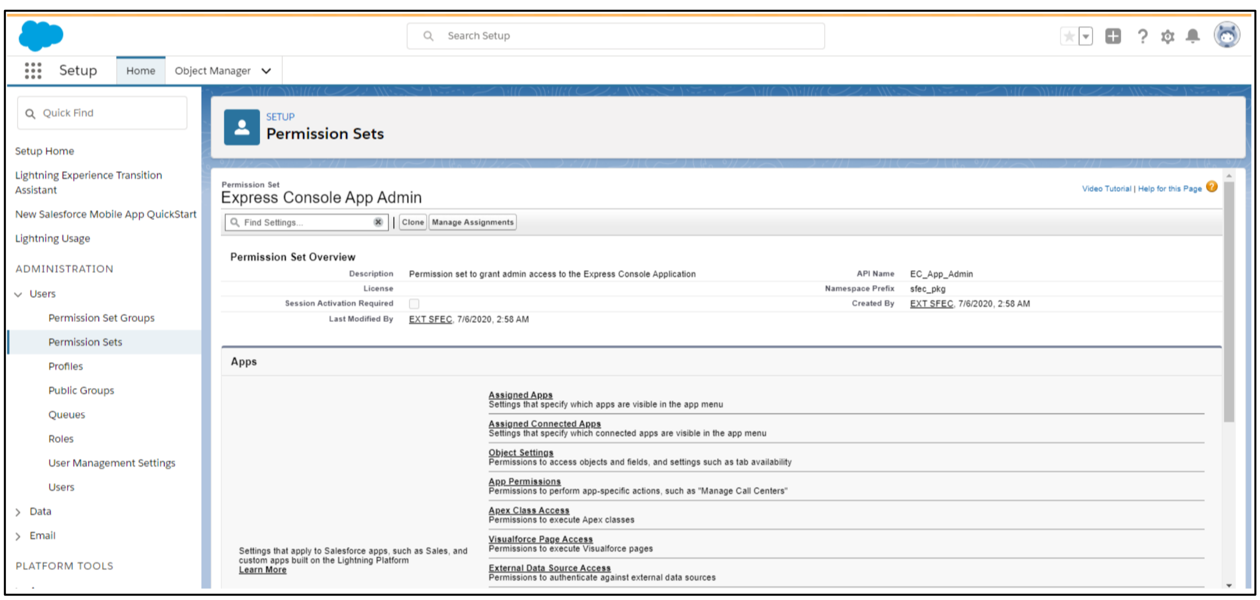
Permission Set Configurations

To enable Express Console and Admin users, go to Setup and Permission Sets.

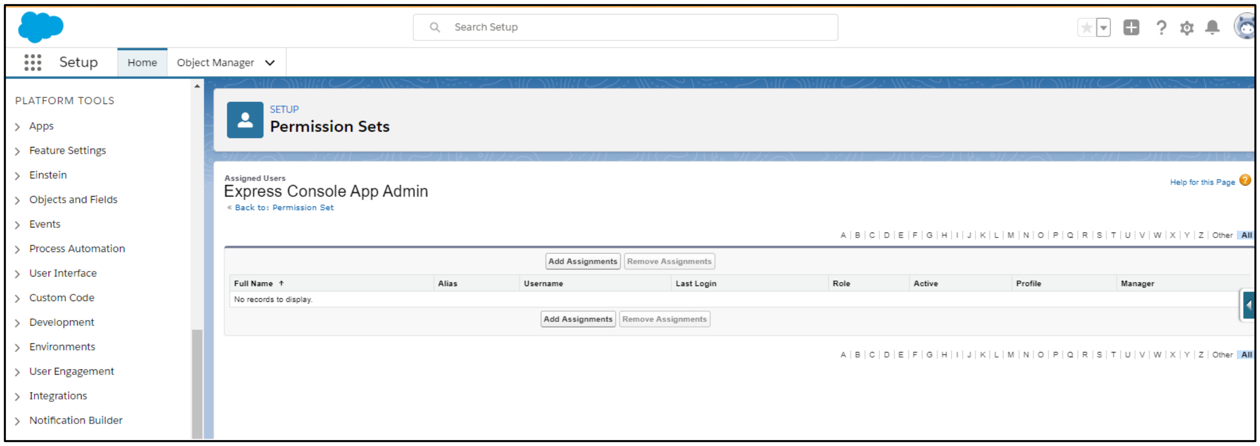


Admin Configuration

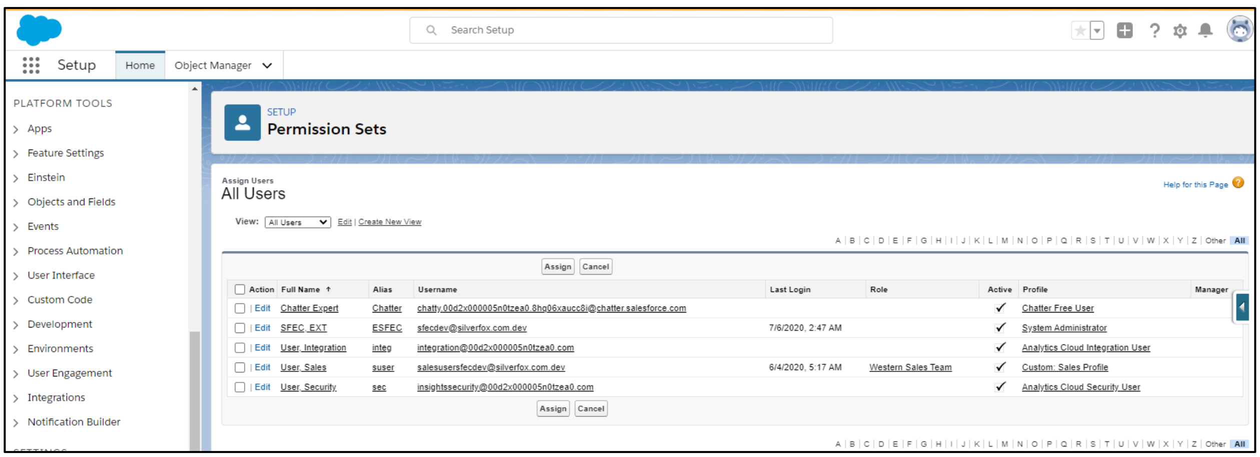
Click on "Express Console App Admin" for Permission Set Label.



Click on Manage Assignments.



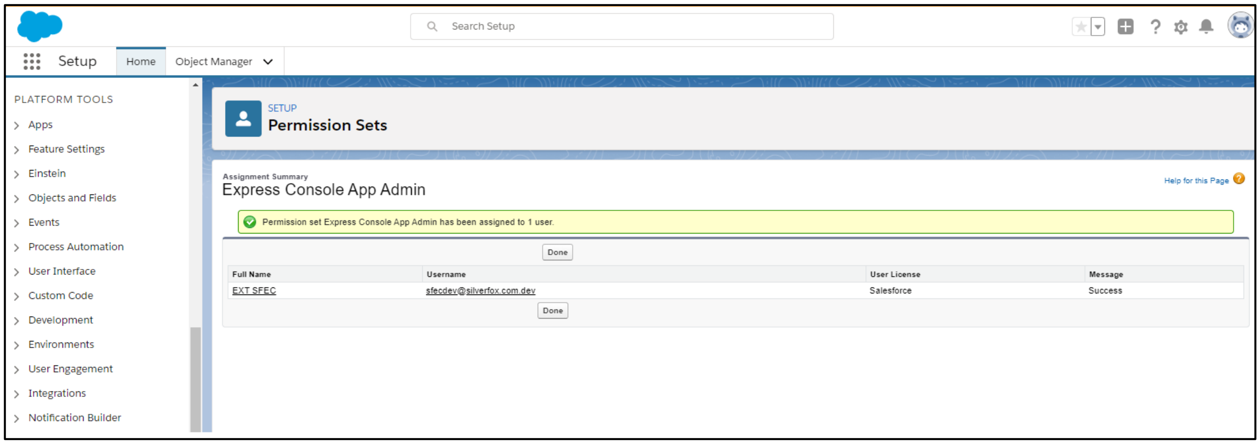
Click on Add Assignments.



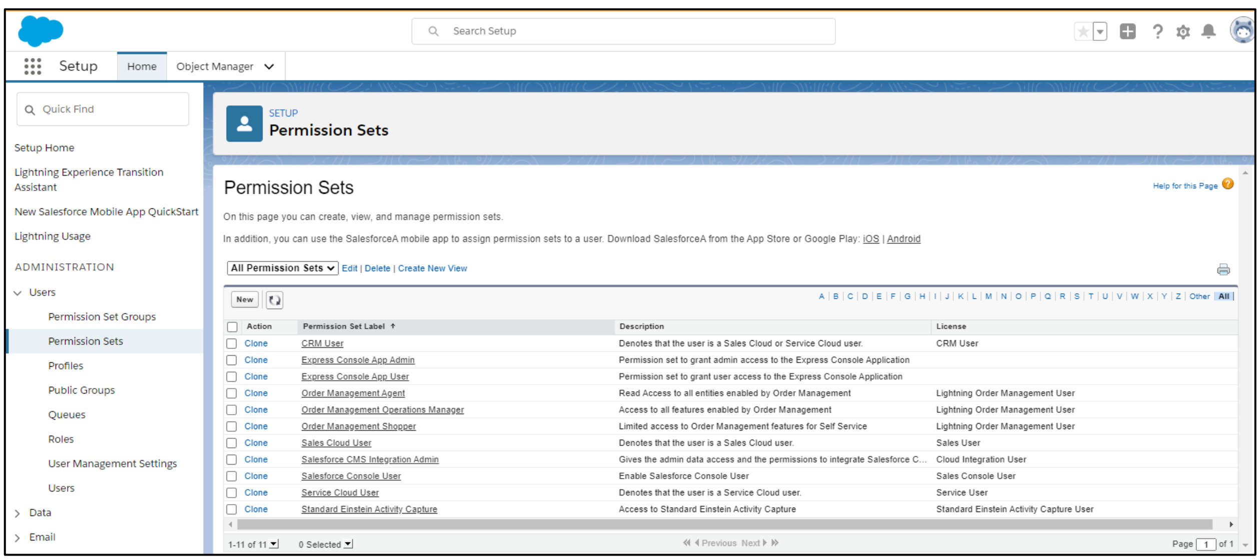
Check the box for the user(s) who will be the Express Console App Administrator (or the user who has been assigned the over-all System Administrator role) and click "Assign".

Note: Users having this permission set will also be designated as Express Console App users but will have access to Express Console admin configurations.

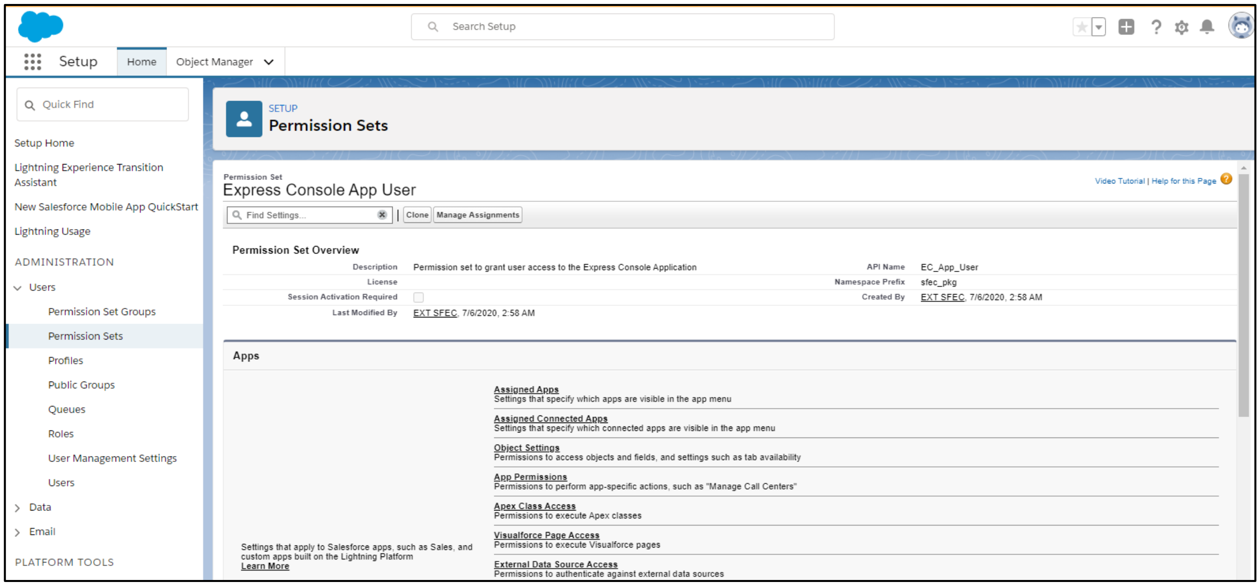
The system will verify that the user has been assigned this Permission Set.



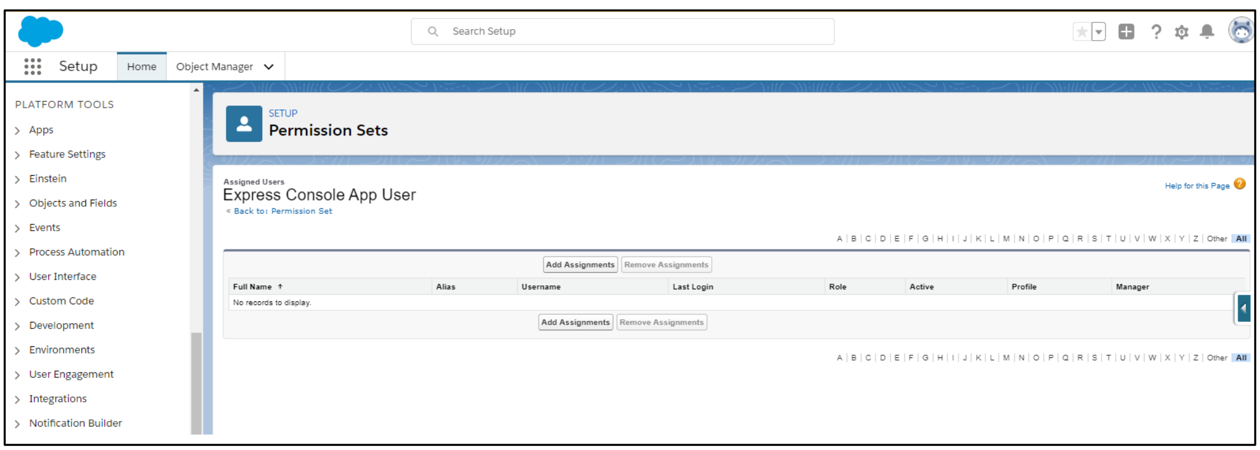
User Configuration



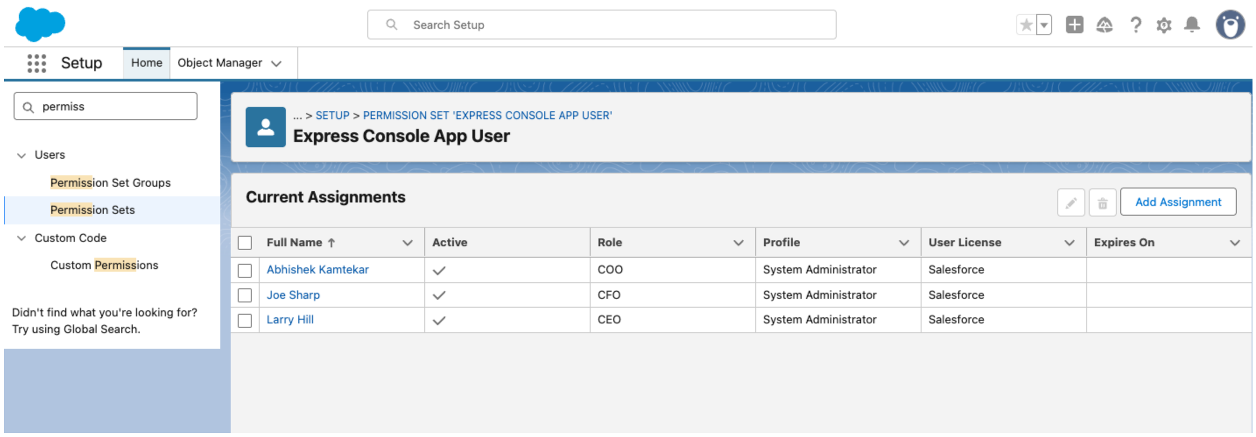
From Setup search for "Permission Sets" and click on the "Express Console App User" Permission Set Label.



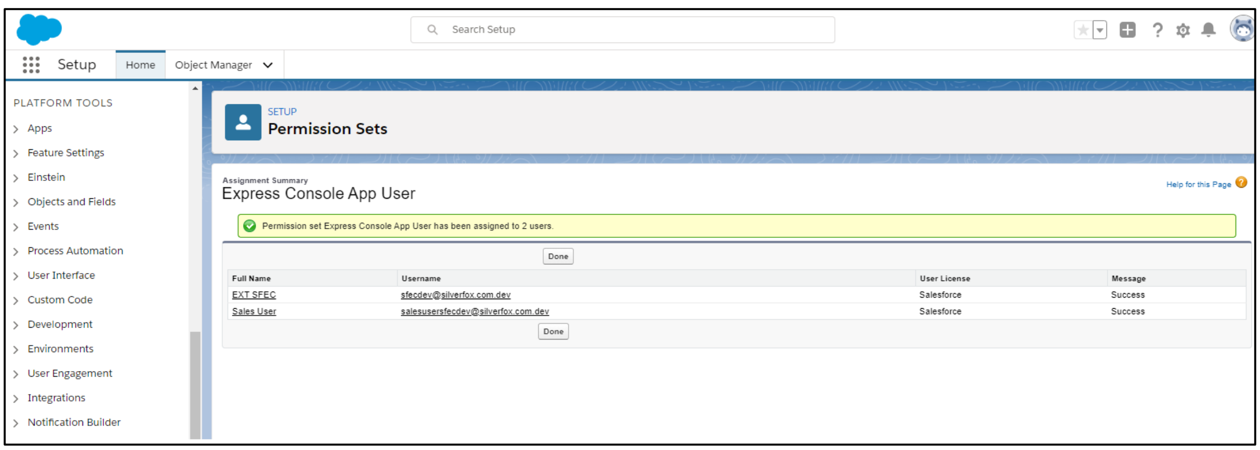
In the Express Console App User permission set, click on Manage Assignments.



Click on Add Assignments.



Check the user(s) to be granted the assignment and click the "Assign" button.



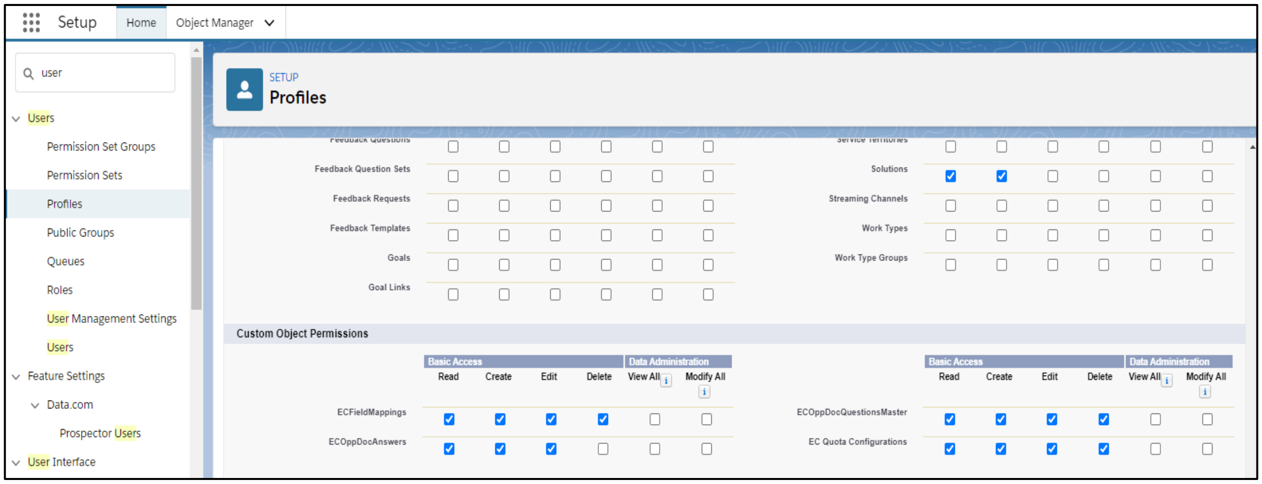
The sytem will confirm the Permission Set assignment.

Object Permission Configuration

If the Opportunity Document and/or Key Tasks are enabled, the Admin user will also need to provide sales users with 'ECOppDocAnswers' Read/Create/Edit permissions.

To provide this permission, the Admin will:

a) Navigate to Setup -> Profiles and open the user's profile (i.e. Profile of the user to whom permission needs to be assigned)
b) Click on Edit on the user's profile
c) Scroll down to Custom Object Permission
d) Enable the Read and Edit checkbox for 'ECOppDocAnswers' permission

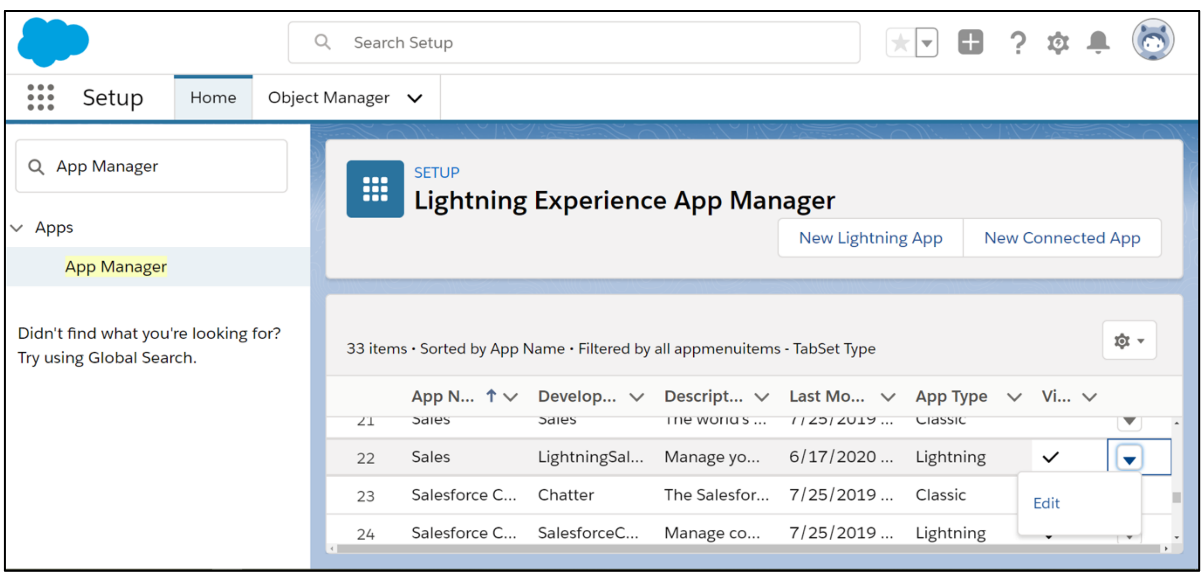


Express Console User Tab Configuration

To configure the user tabs for the Express Console:

a) Verify that the “System Administrator” profile shows both the “Express Console” and “Express Console Admin” tabs. If not, please set the tab visibility to “Default On”.

b) From Setup search for “App Manager” and click on it. It will look something like this:



a) Once inside App Manager, choose Sales App (LightningSales) and choose edit action from the dropdown on the right side.

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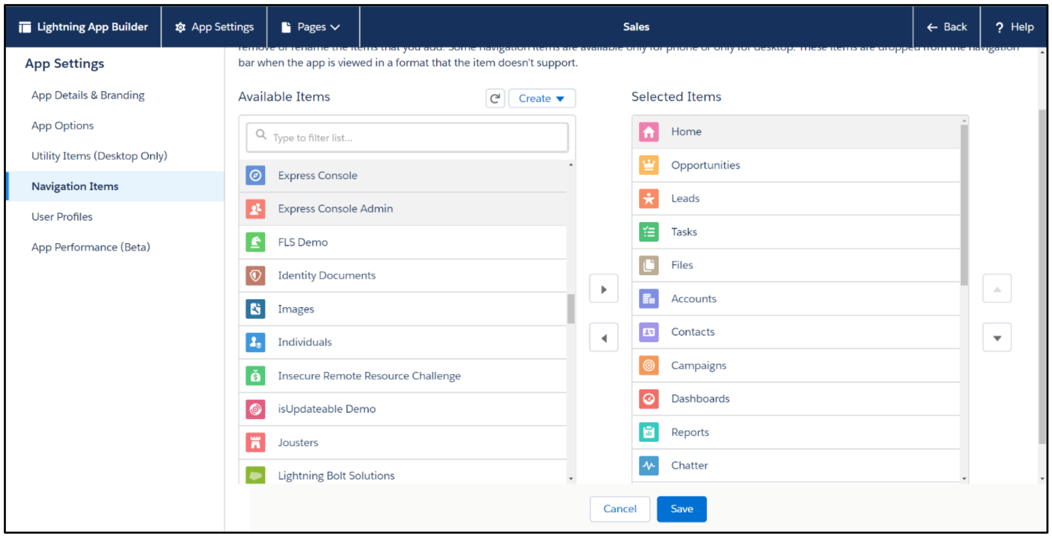
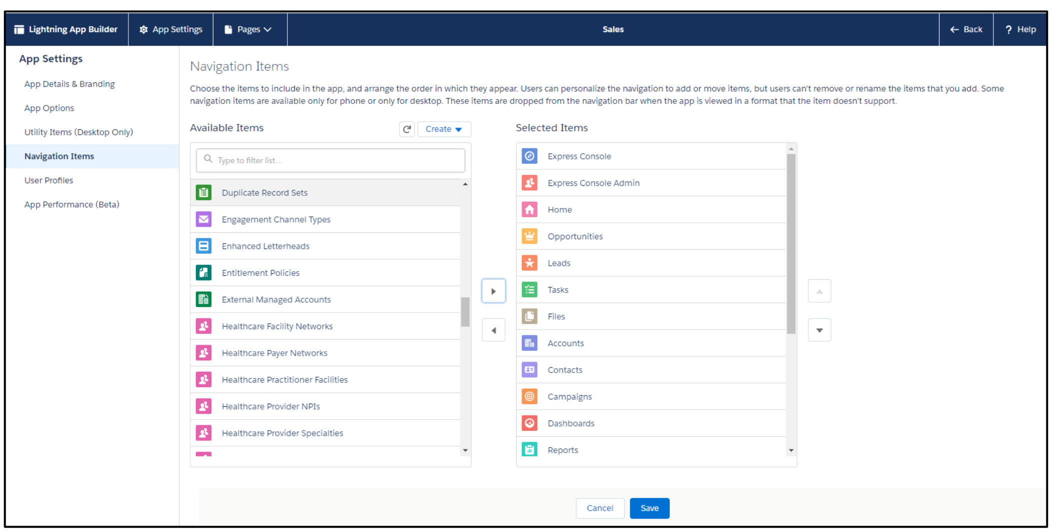
b) Once inside the Lightning App Builder, under the App Settings menu, click on Navigation items.



From Available Items, find Express Console and Express Console Admin. (Note that the Admin tab is optional as the Administrator can directly open this from App Launcher anytime). Highlight these items and move them into Selected Items by clicking the right arrow character.

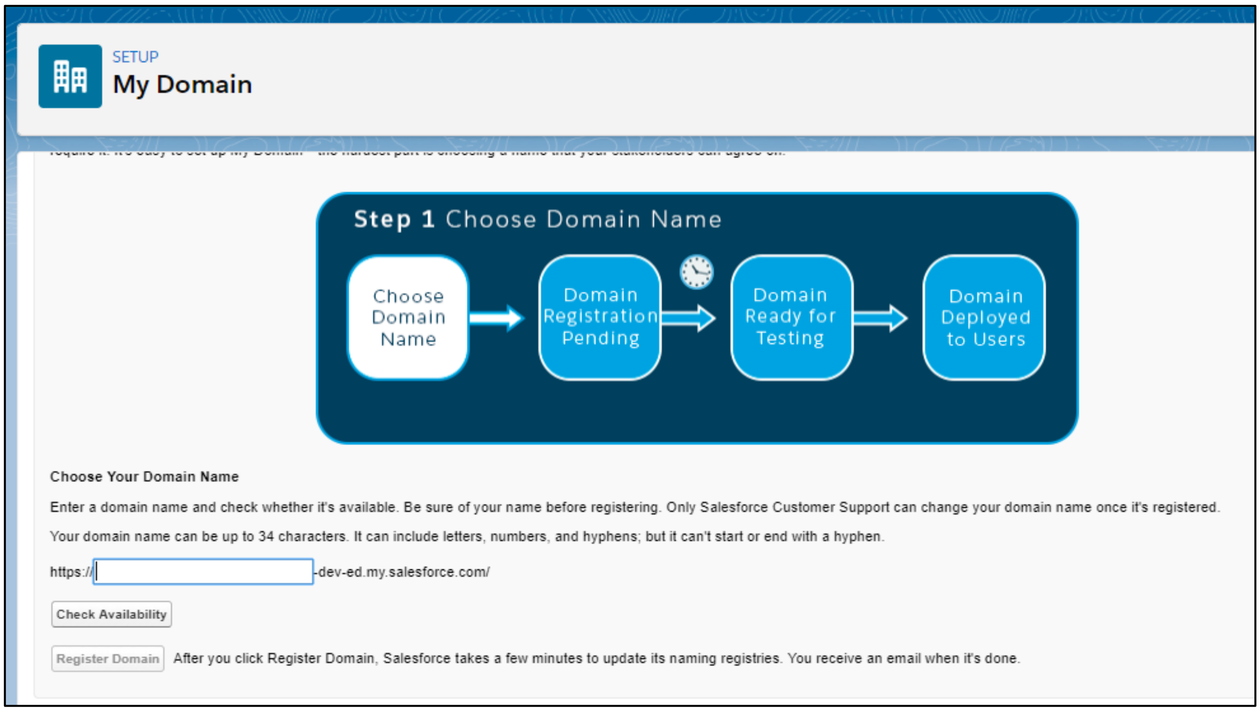


c) Save these settings.
d) Click on the Back button to return to the Setup menu.

APPENDIX 1: REGISTER MY DOMAIN

If you don't, you can create one by following these steps:

1. From Setup search for "My Domain" and click on the input area after "https://.



2. Enter a domain name of your choice and click Check Availability.
3. If the domain name is available, click Register Domain. If not available, try another name.

Note: Most companies use a shortened version of their company name for this Domain name, e.g. "Genco" for the General Company. It may take a few minutes to register the domain after clicking Register Domain. (Note that this is a permanent addition to your org, so choose wisely).

Once your domain is registered, proceed to the initial step of Installing the Express Console.