



GoLocal

Multi Time Zone Bliss for Salesforce

Customization Guide

Summer '11 Release

Revision 1.0

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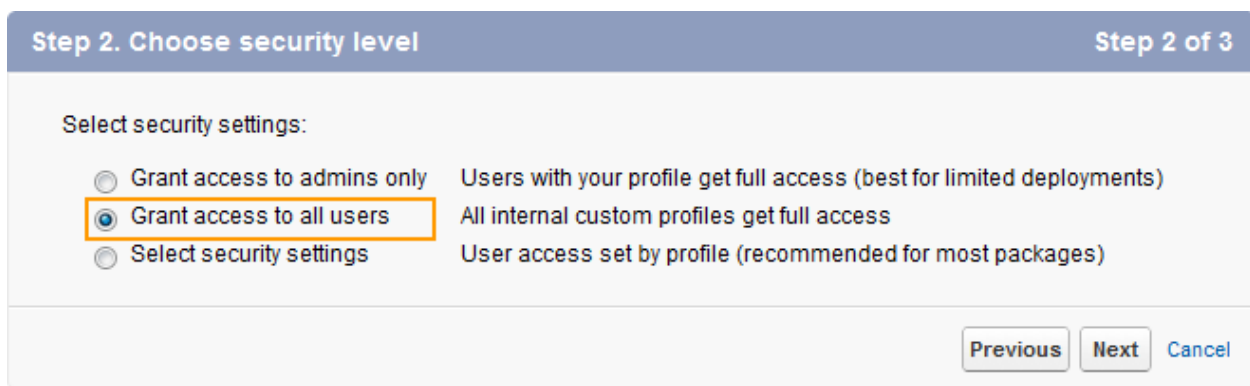
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Installing GoLocal

After you click the Get It Now button on GoLocal's AppExchange page, confirm your login details and accept the license agreement, Salesforce will take you to the package installation wizard. We recommend that you follow the instructions below to make sure that GoLocal is setup properly in your Salesforce org:

On "Step 1. Approve Package API Access", click **Next**.

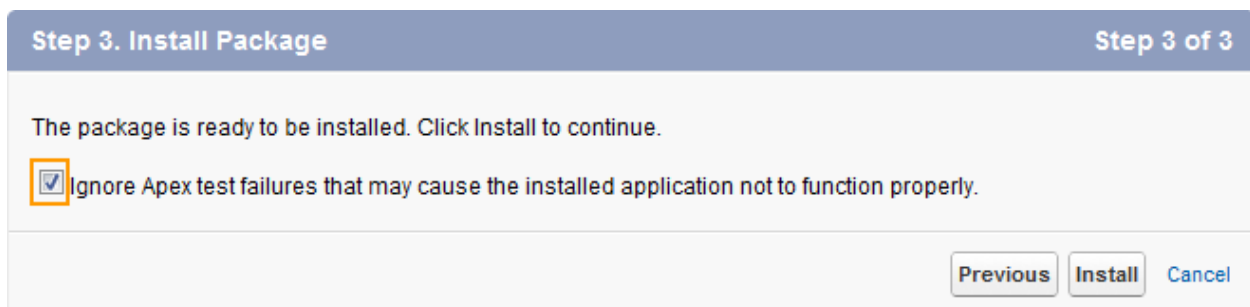
On "Step 2. Choose security level", we recommend choosing "Grant access to all users", this way all users that are assigned a license will be able to use GoLocal without additional security setting modifications.



The screenshot shows the 'Step 2. Choose security level' screen of the Salesforce package installation wizard. The header bar is blue with 'Step 2. Choose security level' on the left and 'Step 2 of 3' on the right. Below the header, the text 'Select security settings:' is followed by three radio button options. The first option is 'Grant access to admins only' with the description 'Users with your profile get full access (best for limited deployments)'. The second option, 'Grant access to all users', is selected and highlighted with an orange box; its description is 'All internal custom profiles get full access'. The third option is 'Select security settings' with the description 'User access set by profile (recommended for most packages)'. At the bottom right, there are three buttons: 'Previous', 'Next', and 'Cancel'.

Click **Next**, to continue.

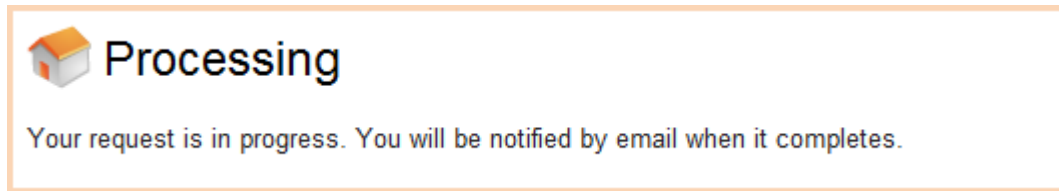
On "Step 3. Install Package", we recommend that you check the "Ignore Apex test failures that may cause the installed application not to function properly" checkbox. If this checkbox is left unchecked some of GoLocal's internal tests might fail due to custom settings in your Salesforce org, however this does not mean the app's functionality will be affected.



The screenshot shows the 'Step 3. Install Package' screen of the Salesforce package installation wizard. The header bar is blue with 'Step 3. Install Package' on the left and 'Step 3 of 3' on the right. Below the header, the text 'The package is ready to be installed. Click Install to continue.' is displayed. Below this text is a checkbox labeled 'Ignore Apex test failures that may cause the installed application not to function properly.' which is checked and highlighted with an orange box. At the bottom right, there are three buttons: 'Previous', 'Install', and 'Cancel'.

Click **Install** to proceed with the installation.

In some cases, you will receive the following message during the installation process:



If that happens, wait for an email from Salesforce confirming that the package was installed successfully, and then proceed to the following customization steps.

Assigning Licenses

Once the GoLocal package is deployed, it's time to assign app licenses. You must assign a license to yourself in order to continue with the setup process. Optionally assign additional licenses to other users that will use GoLocal (the trial version comes with 10 user licenses by default).

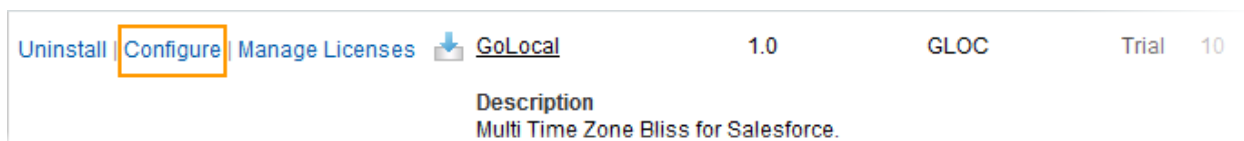
To Assign GoLocal licenses, go to **Setup > Installed Packages** (under App Setup), and click the **Manage Licenses** link next to the GoLocal Package.



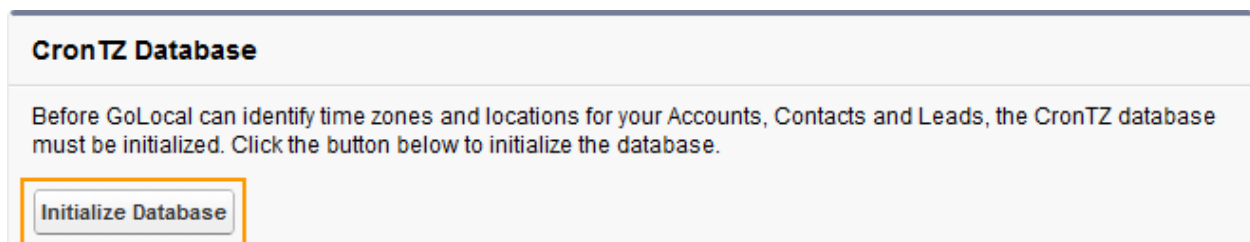
Once licenses are assigned, you can proceed to the following customization steps.

Initialize the CronTZ Database

Go to **Setup > Installed Packages** (under App Setup), and click the **Configure** link next to the GoLocal Package.



On the GoLocal App Setup page click **Initialize Database**.



Database initialization might take up to a minute. When complete, the page will refresh and display the current CronTZ Database version.

CronTZ Database

Current database version: 1.12
 Latest database version: 1.12

Upgrade Database

Set the Default Country Prefix (Optional)

The default county prefix setting controls how GoLocal treats local phone numbers in case no other location information is specified on record. Optionally specify a value that is different from the default (US).

Location Defaults

Default Country Prefix ! = Required Information

GoLocal will use the default country dialing prefix to determine locations for local phone numbers. For example, the local number (212) 123-4567 will be treated as a US phone number if 'US (1)' is specified as the default prefix.

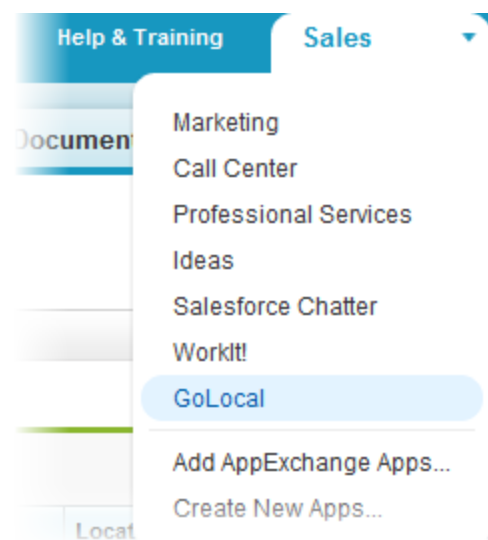
US (1)

Save

Tip: Usually it's best to specify the country code of your company's primary location as the default country prefix. For example if you are located in the United Kingdom, specify GB (44).

GoLocal is now installed in your Salesforce org, and can be accessed by switching to the GoLocal app in the App selector dropdown.

The next section describes how to add GoLocal to your page layouts for an enhanced user experience.



Adding GoLocal to your Page Layouts

This section describes how to add the [GoLocal Widget](#), [Scheduler](#) buttons, the [Create Hit-List](#) button, and the [Mini Agenda](#) and [Mini Hit-List](#) components to your page layouts.

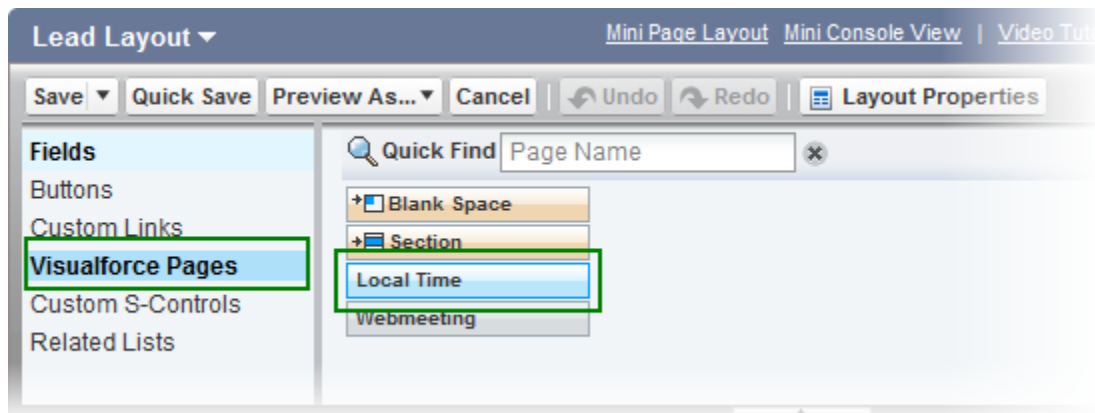
GoLocal Widget

GoLocal's Local Time Widget can be added to the page layouts of the following Salesforce objects: Lead, Contact, Account, Opportunity, Case, Task, and Event.

The following example shows how to add the GoLocal Widget to a Lead page layout, repeat those steps for each of the above objects' page layouts as needed:

Go to **Setup > Customize > Leads** (or another supported Object's name) > **Page Layouts**, and edit the page layout that you want to add the GoLocal Widget to.

Select Visualforce Pages on the top of the page, and then drag the Local Time Visualforce component to the desired place on the page layout.



Please Note: on the Case, Opportunity, and Task layouts the Visualforce component will appear as Contact Local Time, Account Local Time, or Party's Local Time, respectively. On the Event layout add the Party's Local Start Time and Party's Local End Time Visualforce components to your layout.

When the component displays on the page layout, click the Wrench icon on its top-right corner.

Lead Detail

Standard Buttons: Edit, Delete, Convert, Clone, Sharing, Find Duplicates

Lead Information (Header visible on edit only)

Lead Owner: Sample User

Name: Sarah Sample

Company: Sample Company

Lead Status: Sample L

Phone: 1-415-55

Email: sarah.sa

Rating: Sample F

Local Time

Title: Sample Title

In the Visualforce Page Properties dialog, specify 15 in the Height field, and check the Show label checkbox.

Visualforce Page Properties

Width (in pixels or %): 100%

Height (in pixels): 15

Show scrollbars: ☐

Show label: ☒

OK Cancel

Click **OK**. The page layout preview should now look like this:

Lead Detail

Standard Buttons

Edit Delete Convert Clone Sharing Find Du

Lead Information (Header visible on edit only)

Lead Owner Sample User * ● Lead Status

* ● Name Sarah Sample Phone

* ● Company Sample Company ● Email

Local Time vf Local Time Rating

Title Sample Title

Save the page layout, and repeat the steps above for other layouts that you wish to add the GoLocal Widget to.

Scheduler Buttons

GoLocal's [Scheduler](#) buttons simplify event scheduling for your users. Follow the steps below to add the New GoLocal Event Button to your page layouts, and to add GoLocal features to your event page.

New GoLocal Event Button

The New GoLocal Event button can be added to the page layouts of the following Salesforce objects: Lead, Contact, Account, Opportunity, and Case.

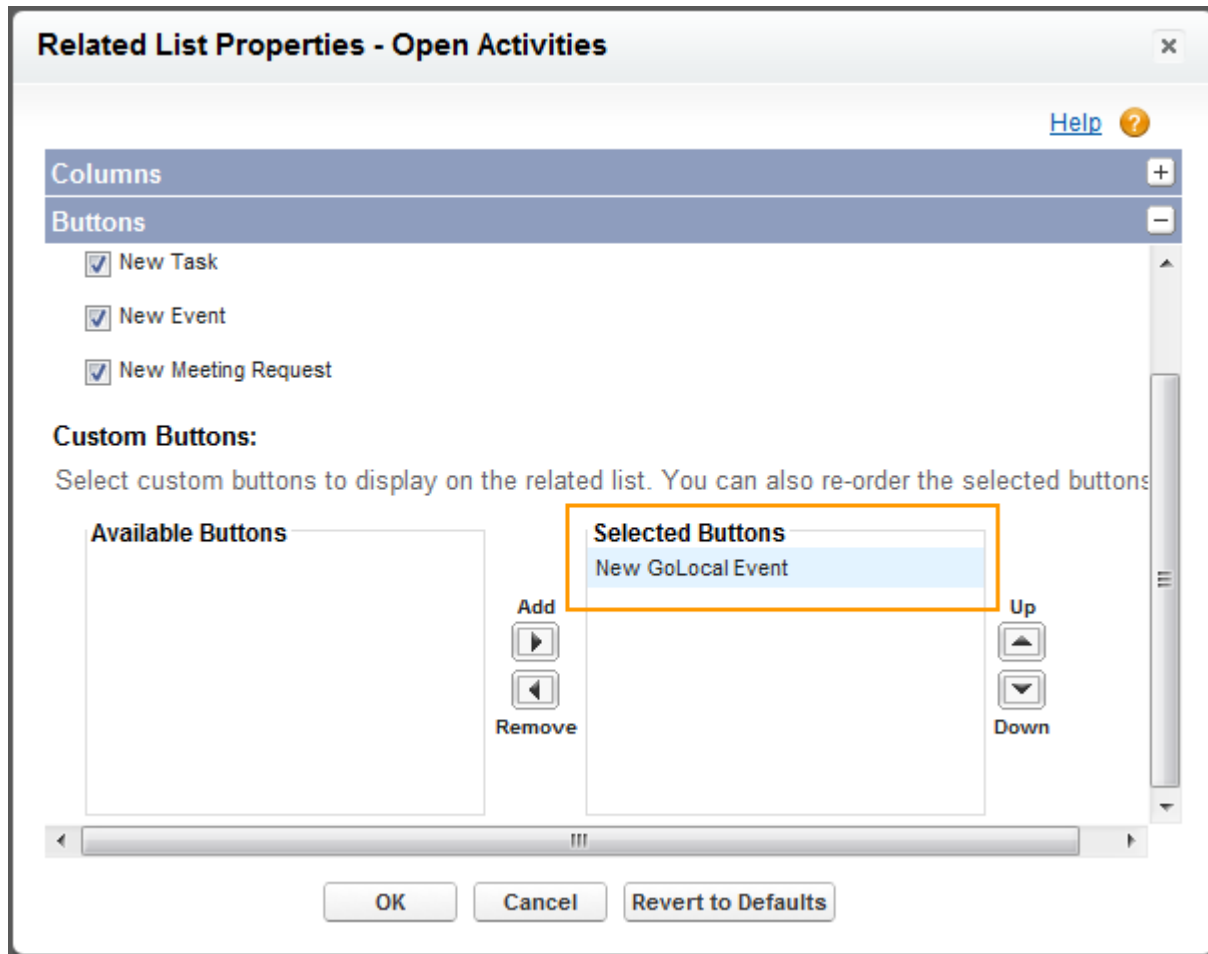
The following example shows how to add the New GoLocal Event button to a Lead page layout, repeat those steps for each of the above objects' page layouts as needed:

Go to **Setup > Customize > Leads** (or another supported Object's name) > **Page Layouts**, and edit the page layout that you want to add the New GoLocal Event button to.

Scroll down to the Open Activities related list in the Page Layout editor and click on the Wrench icon.

</

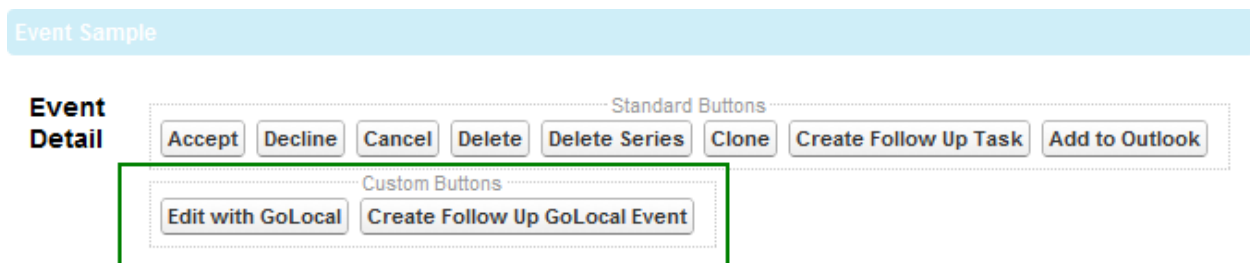
In the Related List Properties dialog, expand the Buttons section, and then add the New GoLocal Event button to the Selected Buttons List.



Click **OK**, and save the page layout. Repeat the steps above for other layouts you wish to add the New GoLocal Event button to.

Customize the Event Page

Go to **Setup > Customize > Activities > Event Page Layouts**, edit your event page layout, and add the Edit with GoLocal and Create Follow Up GoLocal Event buttons to the Custom Buttons page section.



Save the page layout, and edit additional Event Layouts if needed.

Create Hit-List Button

The Create Hit-List button gives your users the ability to create [Custom Hit-Lists](#) from a leads view page. Follow the steps below to add the Create Hit-List button to your leads list views.

Go to **Setup > Customize > Leads > Search Layouts**, and click **Edit** next to the Leads List View layout.

Lead Search Layouts		
Action	Layout	Columns Displayed
Edit	Search Results	Name, Title, Phone, Company, Email, Lead Status, Owner Alias
Edit	Lookup Dialogs	Name, Company
Edit	Lookup Phone Dialogs	Name, Company, Phone, Mobile
Edit	Leads Tab	Name, Company, Phone
Edit	Leads List View	N/A
Edit	Search Filter Fields	

Next, add the Create Hit-List Button to the Selected Buttons list in the Custom Buttons Section.

Custom Buttons

Available Buttons

--None--

Selected Buttons

Create Hit-List

Add

Remove

Up

Down

Save

Cancel

Click **Save**. The Create Hit-List Button will now appear when viewing lead lists.

Mini Home Page Components

The minified [Agenda](#) and [Hit-List](#) home page components give your users a preview of their tasks and leads right when logging into Salesforce. Complete the following steps to add those components to your home page layout.

Go to **Setup > Customize > Home > Home Page Layouts**, and edit the home page layout that you wish to add the GoLocal components to.

In the Select the components to show page select the Mini Agenda and Mini Hit-List components and click **Next**.

Step 1. Select the components to show Step 1 of 2

Choose the components to include on your home page layout.

Layout Name

Select Wide Components to Show | = Required Information

Items to Approve ☐	Calendar ☒
Tasks ☒	Dashboard Snapshot ☒
Mini Agenda ☒	Mini Hit-List ☒

In the Order the Components page, reorder the components to display as desired and then click **Save**.

GoLocal App Components

On-Line Help

The contents of this section are also available to your Salesforce users within GoLocal's online help pages. While working, your users can click the Help for this Page link within any of GoLocal's tabs to see the relevant help topic.



Overview

GoLocal helps you keep in touch with leads and contacts located in remote states and even countries. GoLocal takes care of calculating local time differences for you, and helps you keep focused on what's really important - your customers and prospects.

While the GoLocal Engine runs in the background to automatically identify locations and time zones for leads, contacts, and accounts in your Salesforce org, you can use the following components to plan your day and to reach your leads and contacts in time:

[Local Time Widget](#) - displays the current location and local time for leads, contacts, accounts, opportunities, cases, and tasks; and the local start and end times for events.

[Agenda Tab](#) - lists your open tasks ordered by the local time at the related lead's or contact's location, so you know when the right time to make the call is.

[Hit-List Tab](#) - lists leads from a selected view (or a set of pre-selected leads) ordered by the local time at each lead's location, so you know when each of them is available and is ready to talk.

[GoLocal Scheduler](#) - lets you schedule events with leads and contacts using your local time or theirs, updating in real-time, so you and your party always know exactly when the meeting is going to take place.

GoLocal Widget

The GoLocal Widget displays the location (flag, country code, and state code if applicable) and the current local time at that location for each lead, account and contact.

Lead Detail

EditDeleteConvertCloneFind Duplicates

Name	Ms Betty Bair
Company	American Banking Corp.
Title	VP, Administration
Local Time	 PA, US 4:29 AM (Eastern Time)
Lead Source	Purchased List

On tasks, cases and opportunities GoLocal will display the associated lead's, contact's or account's location and local time respectively.

Case Detail

Edit

Delete

Close Case

Clone

Case Number	00001000
Account Name	Edge Communications
Contact Name	Rose Gonzalez
Contact Local Time	 MX 3:34 AM
Type	Electrical

On calendar events, GoLocal will display the local start and end times for the associated lead or contact, so it's always easy to communicate the exact meeting time to your prospects and customers in their local time zone.

Event Detail

Edit

Delete

Create Follow Up

Subject	Follow Up Call
Name	Rose Gonzalez
Start	5/25/2011 10:00 PM Check Availability
End	5/25/2011 11:00 PM
Party's Local Start Time	 MX 5/25/2011 2:00 PM
Party's Local End Time	 MX 5/25/2011 3:00 PM

Tip: use the [GoLocal Scheduler](#) to schedule events with your leads and contacts using their local time.

GoLocal Agenda

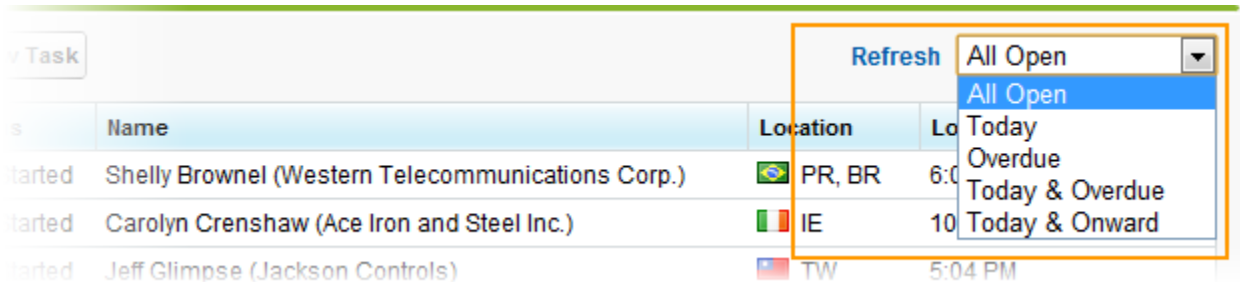
The Agenda tab within the GoLocal app helps you plan your day when you need to contact multiple leads and contacts which are distributed across different states and even countries.

The Agenda tab displays your open tasks sorted by the related lead's or contact's local time, so it's always easy to see which leads or contacts can be reached now, or when it's better to try reaching them later.

Action	Due Date	Subject	Pr	Location	Local Time
Edit Cls	6/2/2011	Send Quote		(Telecommunications Corp.)	 PR, BR 6:04 AM
Edit Cls	5/28/2011	Call		(Iron and Steel Inc.)	 IE 10:04 AM
Edit Cls		Follow Up	No	(Controls)	 TW 5:04 PM
Edit Cls	5/27/2011	Call Back	No	(Entertainment Corp.)	 JP 6:04 PM
Edit Cls	5/24/2011	Send Quote		(Insurance)	 NSW, AU 7:04 PM
Edit Cls	6/4/2011	Call	No	(Time Products)	 VIC, AU 7:04 PM

Use the filter pick-list to display limited sets of tasks based on due dates, for example you can show only overdue task, or only tasks that are scheduled for today. Use the Refresh link to update the Local Time

column and other information in the table.



Mini Agenda

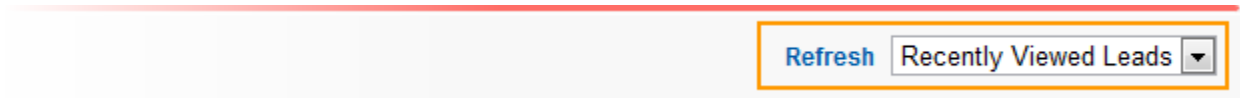
The Mini Agenda homepage component displays a minified agenda view on your homepage, showing 10 tasks per page as a preview of your daily tasks right when you log into Salesforce.

GoLocal Hit-List

The GoLocal Hit-List is a great way to select the leads you want to reach out to during the day. The Hit-List tab displays leads from a given leads view (similar to the leads tab) sorted by the lead’s current local time, so it’s easy to see right away which leads are ready to talk now, and which are probably away.

Action	Name	Company	Location	Local Time	Lead Status
Edit	David Monaco	Blue	JP	12:09 AM	Working - Contacted
Edit	Kristen Akin	Aeth	VIC, AU	1:09 AM	Working - Contacted
Edit	Phyllis Cotton	Abbott	NSW, AU	1:09 AM	Open - Not Contacted
Edit	Pat Stumuller	Pyram	NSW, AU	1:09 AM	Closed - Converted
Edit	Sandra Eberhard	High	CA, US	8:09 AM	Working - Contacted
Edit	Brenda McClurer	Cadi	IL, US	10:09 AM	Working - Contacted
Edit	Tom James	Delph	MN, US	10:09 AM	Working - Contacted
Edit	Andy Young	Dicken	KS, US	10:09 AM	Closed - Converted
Edit	Bertha Boxer	Farm	FL, US	11:09 AM	Working - Contacted
Edit	Phyllis Cotton	Abbott	QC, CA	11:09 AM	Open - Not Contacted
Edit	Mike Braund	Metron	MD, US	11:09 AM	Open - Not Contacted

Use the View pick-list to show leads from a specific view, and the Refresh link to update the Local Time column and other information in the table.

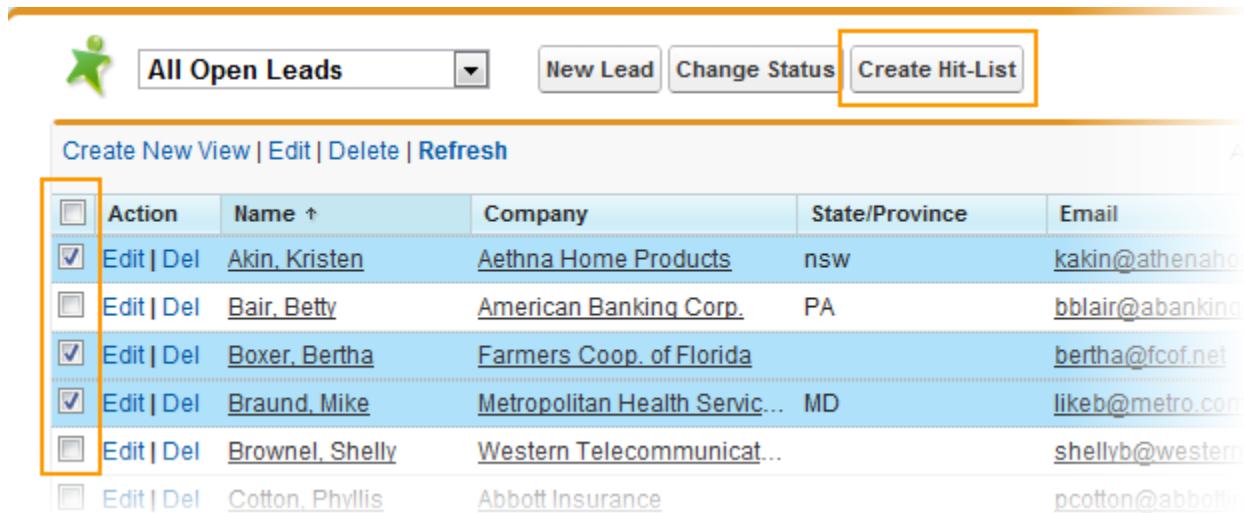


Please Note: The Hit-List tab will display up to 500 leads for a given view. We recommend that you create views that contain up to 250 leads at a time for optimal performance.

Custom Hit-Lists

While the Hit-List tab shows all of the leads from a specific leads view, you can also create a Hit-List to display only a set of selected leads (great when you have specific leads that you wish to contact during

the day).



GoLocal Leads interface showing the 'All Open Leads' view. The 'Create Hit-List' button is highlighted. Below the buttons is a table of leads with columns: Action, Name, Company, State/Province, and Email. Several rows are selected, and the 'Edit | Del' link in the first column of the selected rows is also highlighted.

Action	Name	Company	State/Province	Email
☒ Edit Del	Akin, Kristen	Aethna Home Products	nsw	kakin@athenaho
☐ Edit Del	Bair, Betty	American Banking Corp.	PA	bblair@abanking
☒ Edit Del	Boxer, Bertha	Farmers Coop. of Florida		bertha@fcof.net
☒ Edit Del	Braund, Mike	Metropolitan Health Servic...	MD	likeb@metro.com
☐ Edit Del	Brownel, Shelly	Western Telecommunicat...		shellyb@western
☐ Edit Del	Cotton, Phyllis	Abbott Insurance		pcotton@abbottin

To create a custom Hit-List, open the desired view in the leads tab, select the desired leads and click the Create Hit-List button. The newly created Hit-List will contain only the leads selected. Use the Refresh link to update the information in the table during the day.

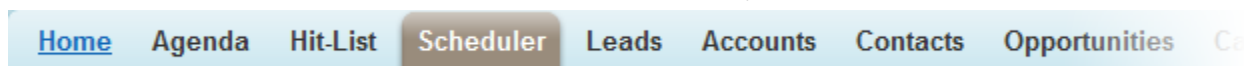
Mini Hit-List

The Mini Hit-List homepage component displays a minified Hit-List view on your homepage, showing 10 leads per page as a preview of your leads right when you log into Salesforce.

GoLocal Scheduler

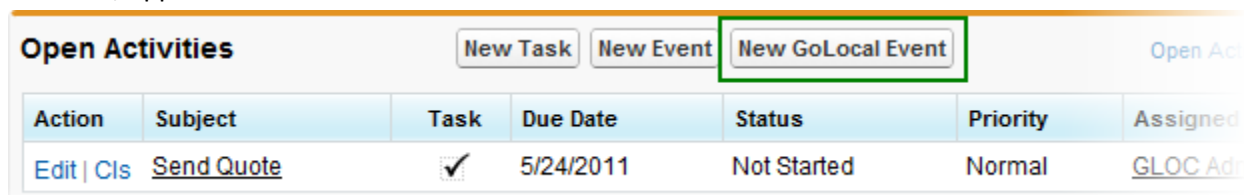
Use the GoLocal Scheduler to schedule events with remote leads and contacts using their local time zone.

The GoLocal Scheduler can be invoked from the Scheduler tab,



GoLocal Scheduler interface showing the 'Scheduler' tab selected in the navigation bar.

or by clicking the New GoLocal Event button in the Open Activities related list on leads, contacts, accounts, opportunities and cases.



GoLocal Open Activities interface showing the 'New GoLocal Event' button highlighted. Below the buttons is a table of activities with columns: Action, Subject, Task, Due Date, Status, Priority, and Assigned.

Action	Subject	Task	Due Date	Status	Priority	Assigned
☒ Edit Cls	Send Quote	✓	5/24/2011	Not Started	Normal	GLOC Ad

When you schedule an event with the GoLocal Scheduler, fill in the event details and description like in a standard Salesforce event page then use the Parties & Schedule section to specify the event start and end times.

Assigned To	Name
Nicole Levy	Lead Phyllis Cotton
Time Zone: America/Los_Angeles (Pacific Time)	Time Zone: Australia/Sydney (Australian Eastern Time)
Start Time: 5/25/2011 [5/25/2011] 5:00 PM [2:48 AM]	Start Time: 5/26/2011 [5/25/2011] 10:00 AM [7:48 PM]
End Time: 5/25/2011 [5/25/2011] 6:00 PM [2:48 AM]	End Time: 5/26/2011 [5/25/2011] 11:00 AM [7:48 PM]

Auto Update

The left side of the Parties & Schedule section shows the event time in the event owner's time zone while the right side shows the event time in the related lead's or contact's time zone. When one of the date or time fields changes, the respective field for the other party will be updated as well to reflect event local time for both parties.

Scheduler Tips

- When changing a date field, use the Ctrl and arrow keys to quickly navigate across the calendar, and the Enter key to select a date.
- On time fields you can use the Up/Down keys to quickly add/subtract 30 minutes to the selected time value.
- While the time fields display the time in your locale, values in both 12 and 24 hour formats are accepted. For example, you can manually enter 4:30 PM or 16:30 and the value be automatically translated to display in the right format.
- You can specify a different event owner in the Assigned To field when scheduling an event for somebody else, the time on the left side will then display in their time zone.
- When entering values in the lookup fields (Related To, Assigned To, and Name) you can enter a partial value and press Enter to see a list of matching options.
- If you wish to edit an existing event, use the Edit with GoLocal button on the event's page.

Contacting Support

At CronSights, we are always happy to hear what our customers have to say.

If you have any questions about GoLocal, encounter any problems with the installation process, or have suggestions for us, please contact us using one of the following channels:

Email: support@cronsights.com

Phone: +1-877-887-5656

Or via the contact form on our website at www.cronsights.com

Appendix 1: Using GoLocal Data

Since all GoLocal's app data is stored inside Salesforce, you can use that data to automate your business processes with Salesforce features like workflow and assignment rules.

GoLocal adds the following set of fields to the Lead, Contact and Account objects:

- GoLocal Country (GLOC__Location_Country__c) – stores the ISO country code for the record's location.
- GoLocal State (GLOC__Location_State__c) – stores the state code (if applicable) for the record's location.
- GoLocal Time Zone (GLOC__Location_Time_Zone__c) – stores the time zone code for the record's location.

Those fields are updated on record creation or when a record's address or phone number fields change, so you can create workflow and assignment rules based on the values of those fields.

GoLocal always uses standard values for its location fields. For example the GoLocal Country field will always have US as the value when it identifies that a Lead, Contact or Account are located in the United States, regardless of the record's Country field's value, meaning that you can base your workflow and assignment rules on standard values.