

Customer Stories Installation Instructions

To install the Customer Stories Application follow these instructions.

1. Select “Continue”

Package Installation Details [Help for this Page](#) ?

Package Name	Customer Stories
Version Name	Customer Stories
Version Number	1.1
Publisher	Salesforce.com
Description	

Continue [Cancel](#)

Package Components

▼ Apps (1)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Customer Stories		App	This is a brand new component.

▼ Code (3)

2. Select “Next”

Step 1. Approve Package API Access Step 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects

Components in this package will have the user's full API access to the following custom objects included in the package:

- CustomerStory

Extended Object Permissions

	Read	Create	Edit	Delete
Accounts	☐	☐	☐	☐
Assets	☐	☐	☐	☐
Campaigns	☐	☐	☐	☐
Cases	☐	☐	☐	☐
Contacts	☐	☐	☐	☐
Contracts	☐	☐	☐	☐
Documents	☐	☐	☐	☐
Ideas	☐	☐	☐	☐
Leads	☐	☐	☐	☐
Opportunities	☐	☐	☐	☐
Price Books	☐	☐	☐	☐
Products	☐	☐	☐	☐
Solutions	☐	☐	☐	☐

General User Permissions

This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions

This Package will not be able to use any of the Administrative Privileges from the user's Profile.

Next [Cancel](#)

3. Choose your security settings and select “Next”

Step 2. Choose security level Step 2 of 3

Select security settings:

☐ Grant access to admins only Users with your profile get full access (best for limited deployments)
☒ Grant access to all users All internal custom profiles get full access
☐ Select security settings User access set by profile (recommended for most packages)

[Previous](#) [Next](#) [Cancel](#)

4. Leave the box next to “Ignore Apex test failures that may cause the installed application not to function properly” **unchecked** and select “Install”

Package Installer [Help for this Page](#)

Customer Stories

Step 3. Install Package Step 3 of 3

The package is ready to be installed. Click Install to continue.

☐ Ignore Apex test failures that may cause the installed application not to function properly.

[Previous](#) [Install](#) [Cancel](#)

5. Select “Deploy Now”

Install complete [Help for this Page](#)

The components contained in this package have been successfully installed.

The final steps in the install process are to:

1. Change the visibility settings for any installed documents, reports, dashboards, letterheads, email templates, and custom fields on standard objects. By default, these components are visible to all users.
2. Set the Running User for any installed dashboards or analytic snapshots; by default, it is set to you.
3. Specify the appropriate recipients for any installed workflow tasks.
4. Specify the appropriate assignees for any installed workflow alerts.
5. Specify the appropriate user for workflow field updates that modify the Owner field or user lookups; by default, it is set to you.
6. Create a schedule for any installed analytic snapshots.
7. Configure any additional settings for this package from the package detail page.
8. Deploy the package by clicking Deploy Now below. You can also do this at any time in the future from the package detail page.

[Deploy Now](#) [Deploy Later](#)

6. Select “Deploy”

Deploy Package [Help for this Page](#)

Click Deploy to make Custom Objects, Workflow Rules, or Custom Report Types in this package available to users who have access to them based on their profile.

Package Components			
Action	Name	Parent Object	Type
	CustomerStory		Custom Object

[Deploy](#) [Cancel](#)

7. You should see something like the screen shot below

Customer Stories

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Installed Package Detail

[Uninstall](#) [Deploy](#) [Show Dependencies](#)

Package Name	Customer Stories	Version Number	1.1
Language	English	Package Type	Unmanaged
Version Name	Customer Stories	Modified By	garrik sturges , 1/19/2011 10:44 AM
Publisher	Salesforce.com		
Description			
Installed By	garrik sturges , 1/19/2011 10:44 AM		

[Uninstall](#) [Deploy](#) [Show Dependencies](#)

Package Components

Action	Name	Parent Object	Type
	Able to Mention Customer Name?	CustomerStory	Custom Field
	Account	CustomerStory	Custom Field
	All	CustomerStory	List View
	Business Focus	CustomerStory	Custom Field
	CSForceDT		Static Resource
	CSForce_Call		Static Resource
	CSForce_Edu		Static Resource
	CSForce_ExtUse		Static Resource
	CSForce_NoCall		Static Resource
	CSForce_Search		Visualforce Page
	CSForce_SearchController		Apex Class
	CSForce_SearchHelper		Apex Class
	CSForce_testingutil		Apex Class
	CSForce_unknown		Static Resource
	CSForceIs		Static Resource
	Contact	CustomerStory	Custom Field
	Customer Stories		Tab
	CustomerStory		Custom Object
	CustomerStory Layout	CustomerStory	Page Layout
	Customer_Stories		App
	Products	CustomerStory	Custom Field
	Quotes	CustomerStory	Custom Field
	Related Opportunity	CustomerStory	Custom Field
	Sales Reference	CustomerStory	Custom Field
	Sharing Restrictions	CustomerStory	Custom Field
	Status	CustomerStory	Custom Field
	Story	CustomerStory	Custom Field
	Story Owner	CustomerStory	Custom Field
	Story Type	CustomerStory	Custom Field
	Synopsis	CustomerStory	Custom Field
	Team	CustomerStory	Custom Field
	Use Contact As Reference?	CustomerStory	Custom Field
	Win Against	CustomerStory	Custom Field

Always show me [▼ more](#) records per related list

Congratulations! You have now installed the Customer Stories application. Please refer to setup instructions to customize the application.