



Renewal Management Enterprise

Installation Guide

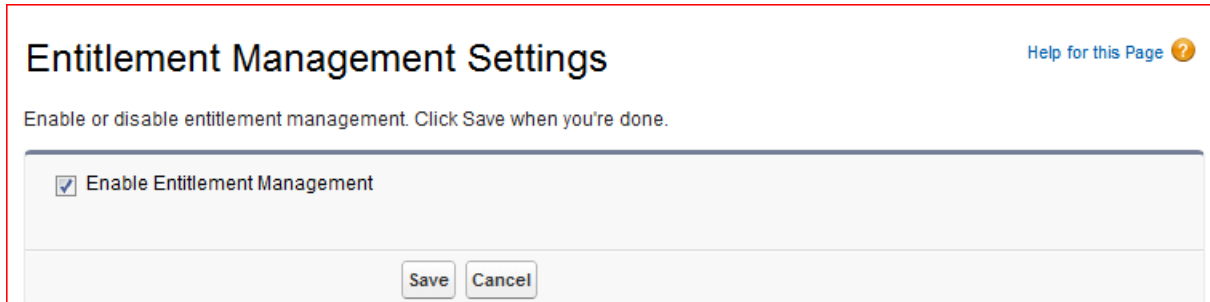
Last updated: Aug 2012

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Installation

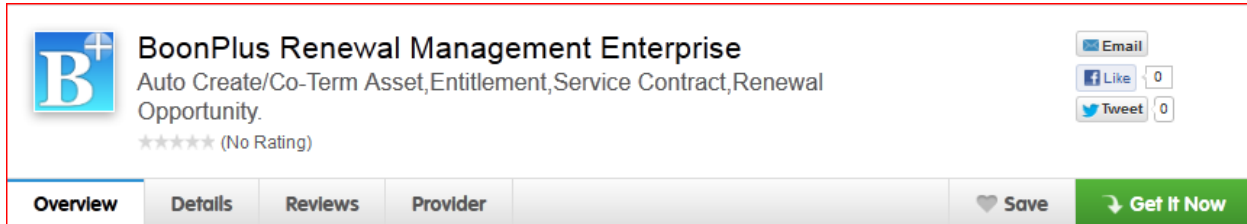
Step 1: Enable Entitlement Management

- Login Salesforce as a System Administrator.
- Go to **Your Name** > **Setup** > **App Setup** > **Customize** > **Entitlement Management** > **Settings**
- Check “Enable Entitlement Management” checkbox and Save.



Step 2: Install Package

- Go to AppExchange, click on the “**Get It Now**” button on the “Renewal Management Enterprise” page.





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- Select an org for the Installation.



BoonPlus Renewal Management Enterprise
Auto Create/Co-Term Asset,Entitlement,Service Contract,Renewal Opportunity.
★★★★★ (No Rating)

EmailLike0Tweet0

OverviewDetailsReviewsProviderSaveGet It Now

How would you like to continue?

**Install in production**
Includes active, trial or developer orgs

**Install in sandbox**
Test in a copy of your production org

- Click on the “**Confirm and Install**” button.



BoonPlus Renewal Management Enterprise
Auto Create/Co-Term Asset,Entitlement,Service Contract,Renewal Opportunity.
★★★★★ (No Rating)

OverviewDetailsReviewsProviderSave

Almost there!

 Before installing, please review the [customization guide](#) to familiarize yourself with the installation and configuration steps for this application.

WHAT YOU ARE INSTALLING	WHERE YOU ARE INSTALLING
PACKAGE BoonPlus Renewal Management Enterprise	ORGANIZATION BoonPlus
VERSION BoonPlus Renewal Management Enterprise (E20120821 / 1.16.0)	EDITION Enterprise Edition
SUBSCRIPTION Free Trial	USER NAME admin@boonplus.com
DURATION 30 Days	
NUMBER OF SUBSCRIBERS Site-wide	

☒ I have read and agree to the [terms and conditions](#) .

[Cancel Install](#) | [Back to previous step](#)

Confirm and Install!



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- Click on the “**Continue**” button on the “Package Installation Details” page.

Package Installation Details

[Help for this Page ?](#)

Package Name	BoonPlus Renewal Management Enterprise
Version Name	E20120821
Version Number	1.16
Publisher	BoonPlus
Description	BoonPlus Renewal Management Enterprise allows Sales/Renewal reps to create/co-term Assets, Entitlements, Service Contracts and Renewal Opportunities automatically.

[Continue](#) [Cancel](#)

- Click on the “**Next**” button on the “Step 1” page.

Package Installer

BoonPlus Renewal Management Enterprise

[Help for this Page ?](#)

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

This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

Entitlements	☒ ☒ ☒ ☒	Solutions	☒ ☒ ☒ ☒
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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 be able to use all of the Administrative Privileges from the user's Profile.

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



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- Check the “Grant access to admins only” checkbox and click on the “Next” button on the “Step 2” page.

Package Installer [Help for this Page](#) ?

BoonPlus Renewal Management Enterprise

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](#)

- Click on the “Install” button on the “Step 3” page.

Package Installer [Help for this Page](#) ?

BoonPlus Renewal Management Enterprise

Step 3. Install Package Step 3 of 3

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

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



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- Package Installation Complete.

Package Details

Help for this Page ?

BoonPlus Renewal Management Enterprise (Managed)

[« Back to List: Installed Package](#)

Install Complete
Follow any remaining steps in the app install guide to complete deployment.

Installed Package Detail

Uninstall

View Components

Manage Licenses

Configure

View Dependencies

Package Name	BoonPlus Renewal Management Enterprise	Version Number	1.16
Language	English	First Installed Version Number	1.16
Version Name	E20120821	Package Type	Managed
Namespace Prefix	rcld	Allowed Licenses	Unlimited
Publisher	BoonPlus	Used Licenses	0
Status	Trial	API Access	Unrestricted [Enable Restrictions]
Expiration Date	9/23/2012	Modified By	Admin User , 8/25/2012 10:05 PM
Description	BoonPlus Renewal Management Enterprise allows Sales/Renewal reps to create/co-term Assets, Entitlements, Service Contracts and Renewal Opportunities automatically.		
Installed By	Admin User , 8/25/2012 10:05 PM		



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Step 3: Create the “Renewal Management Administrator” Profile

- Go to **Your Name > Setup > Administration Setup > Manage Users > Profiles**
- Click on the link of the “System Administrator” profile.
- Click on the “Clone” button on the “System Administrator” profile page.

Profile Help for this Page ?

System Administrator

[« Back to List: Installed Package](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[1\]](#)

Profile Detail Edit Clone View Users

Name	System Administrator
User License	Salesforce
Custom Profile	☐

- Enter “**Renewal Management Administrator**” as the new profile name and Save.

Clone Profile Help for this Page ?

Enter the name of the new profile.

You must select an existing profile to clone from. ! = Required Information

Existing Profile	System Administrator
User License	Salesforce
Profile Name	Renewal Management A

Save Cancel



Renewal Management Enterprise Installation Guide

Step 4: Assign “Renewal Management” Page Layouts

- On the “Renewal Management Administrator” profile page, change the Page Layout Assignment of the following Standard Objects:
 - Asset
 - Product
 - Entitlement
 - Opportunity
 - Service Contract
 - Contract Line Item
 - Opportunity Product
- For example, click on the [[View Assignment](#)] link next to the “Opportunity” object.

Page Layouts			
Standard Object Layouts			
Home Page Layout	Dashboard Home Page Default [View Assignment]	Entitlement	Entitlement Layout [View Assignment]
Account	Account Layout [View Assignment]	Event	Event Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Lead	Lead Layout [View Assignment]
Campaign	Campaign Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Campaign Member	Campaign Member Page Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]

- Click on the “**Edit Assignment**” button on the “Page Layout Assignment” page.

Page Layout Assignment

Help for this Page ?

Opportunity

The table below shows the page layout assignments for different profiles.

Edit Assignment

Profiles	Page Layout
Contract Manager	Opportunity Layout
Gold Partner User	Opportunity Layout
Marketing User	Opportunity Layout
Read Only	Opportunity Layout
Renewal Management Administrator	Opportunity Layout
Solution Manager	Opportunity Layout
Standard User	Opportunity Layout
System Administrator	Opportunity Layout



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- Select “**Renewal Management Opportunity Layout**” from the drop-down list for the “Renewal Management Administrator” profile and Save.

Edit Page Layout Assignment

Help for this Page ?

Opportunity

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

SaveCancel

Page Layout To Use: Renewal Management Opportunity Layout ▾ 1 Selected 1 Changed

Profiles	Page Layout
Contract Manager	Opportunity Layout
Gold Partner User	Opportunity Layout
Marketing User	Opportunity Layout
Read Only	Opportunity Layout
Renewal Management Administrator	<i>Renewal Management Opportunity Layout</i>
Solution Manager	Opportunity Layout
Standard User	Opportunity Layout
System Administrator	Opportunity Layout

- Repeat the same process and assign the “Renewal Management” Page Layouts to the following objects ...
 - Asset [Renewal Management Asset Layout](#)
 - Product [Renewal Management Product Layout](#)
 - Entitlement [Renewal Management Entitlement Layout](#)
 - Opportunity [Renewal Management Opportunity Layout](#)
 - Service Contract [Renewal Management Service Contract Layout](#)
 - Contract Line Item [Renewal Management Contract Line Item Layout](#)
 - Opportunity Product [Renewal Management Opportunity Product Layout](#)



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Below is the screenshot of the final Layout Assignment on the “Renewal Management Administrator” profile page.

Page Layouts			
Standard Object Layouts			
Home Page Layout	Dashboard Home Page Default [View Assignment]	Entitlement	Renewal Management Entitlement Layout [View Assignment]
Account	Account Layout [View Assignment]	Event	Event Layout [View Assignment]
Asset	Renewal Management Asset Layout [View Assignment]	Lead	Lead Layout [View Assignment]
Campaign	Campaign Layout [View Assignment]	Opportunity	Renewal Management Opportunity Layout [View Assignment]
Campaign Member	Campaign Member Page Layout [View Assignment]	Opportunity Product	Renewal Management Opportunity Product Layout [View Assignment]
Case	Case Layout [View Assignment]	Product	Renewal Management Product Layout [View Assignment]
Case Close	Close Case Layout [View Assignment]	Service Contract	Renewal Management Service Contract Layout [View Assignment]
Case Milestone	Case Milestone Layout [View Assignment]	Solution	Solution Layout [View Assignment]
Contact	Contact Layout [View Assignment]	Task	Task Layout [View Assignment]
Contract	Contract Layout [View Assignment]	User	User Layout [View Assignment]
Contract Line Item	Renewal Management Contract Line Item Layout [View Assignment]		

Step 5: Add users to the Renewal Management Administrator Profile

- Create new users or assign existing users to the Renewal Management Administrator profile.

Step 6: Test the Installation

- Login Salesforce as a Renewal Management Administrator.
- Follow the different scenarios in the use case guides and learn how to use Renewal Management Enterprise.