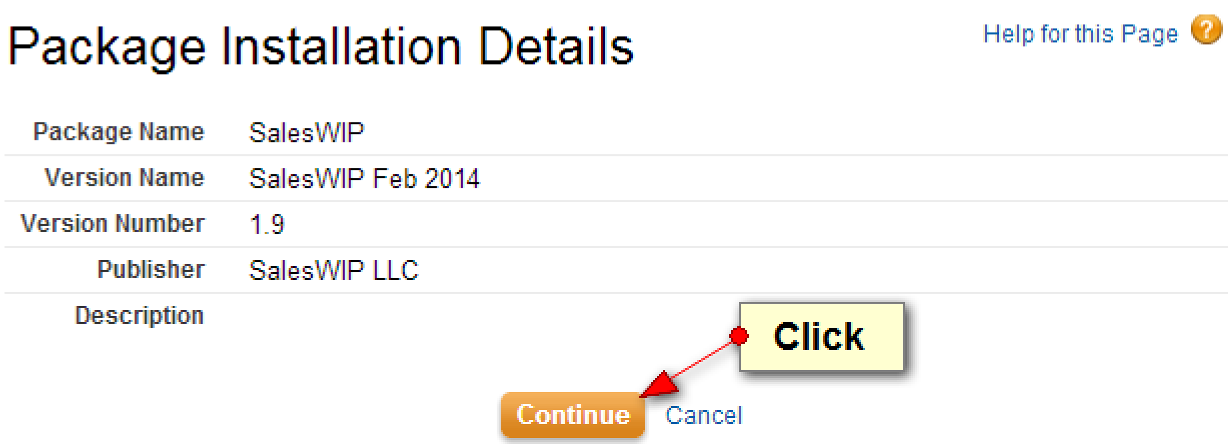
SalesWIP v1.9 Installation Guide

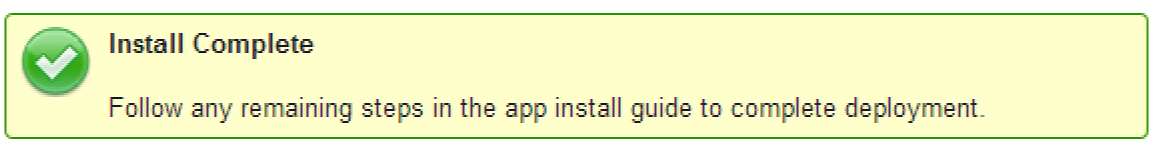
1. **If you haven't already installed the SalesWIP application, click on the package URL below to initiate the installation.**

   https://login.salesforce.com/packaging/installPackage.apexp?p0=04tG0000000Wee7

   If you are not logged into Salesforce then it will redirect you to the login screen. Click on "Continue" and follow the wizard steps to complete the installation.



Once the app finishes installing, you should see this prompt:



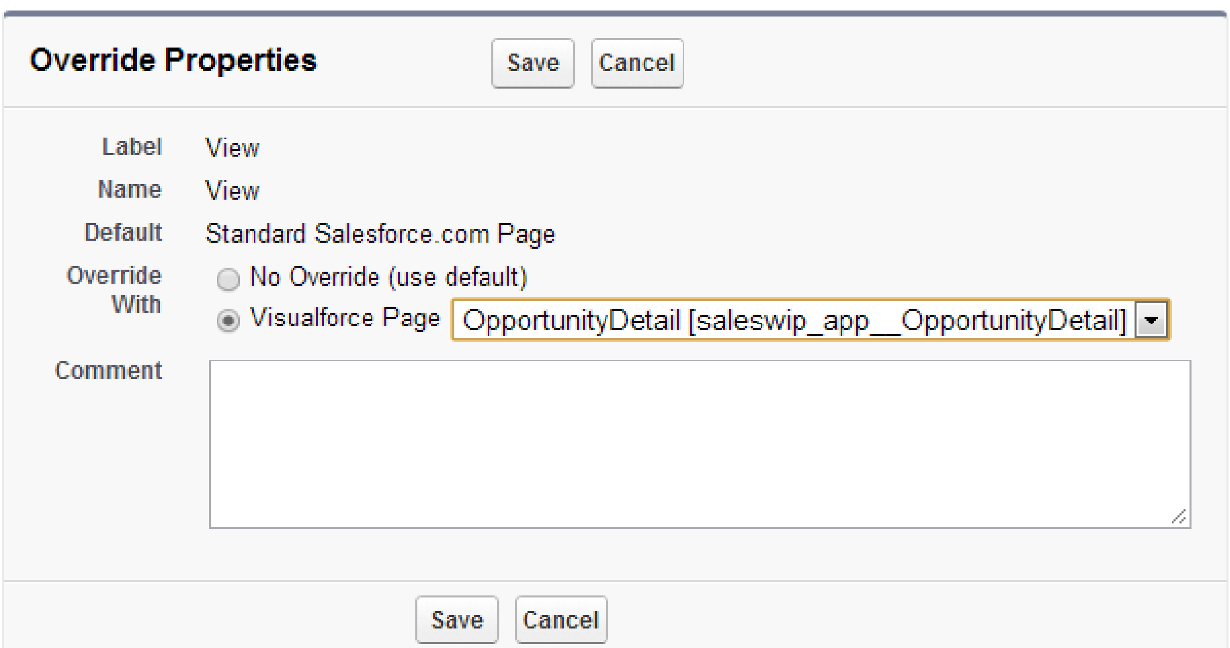
Manual SalesWIP Post-Installation Steps

2. Once the package installation is complete, you will override the following three buttons to load the new Opportunity-related pages.

Button Name	VF Page Name
View	OpportunityDetail
Edit	EditOpportunity
New	NewOpp

Steps to override Opportunity standard buttons:

a. Go to Setup > App Setup > Customize > Opportunities > Buttons, Links, and Actions
b. Click on the "Edit" link next to the button named "View"
c. Select Override With "Visualforce Page".
d. Select "OpportunityDetail" from the drop-down list.



e. Click "Save" and repeat steps a) through e) for the "Edit" and "New" buttons, selecting the matching Visualforce page from the table above.

3. Adding the custom fields to the Opportunity Page Layout

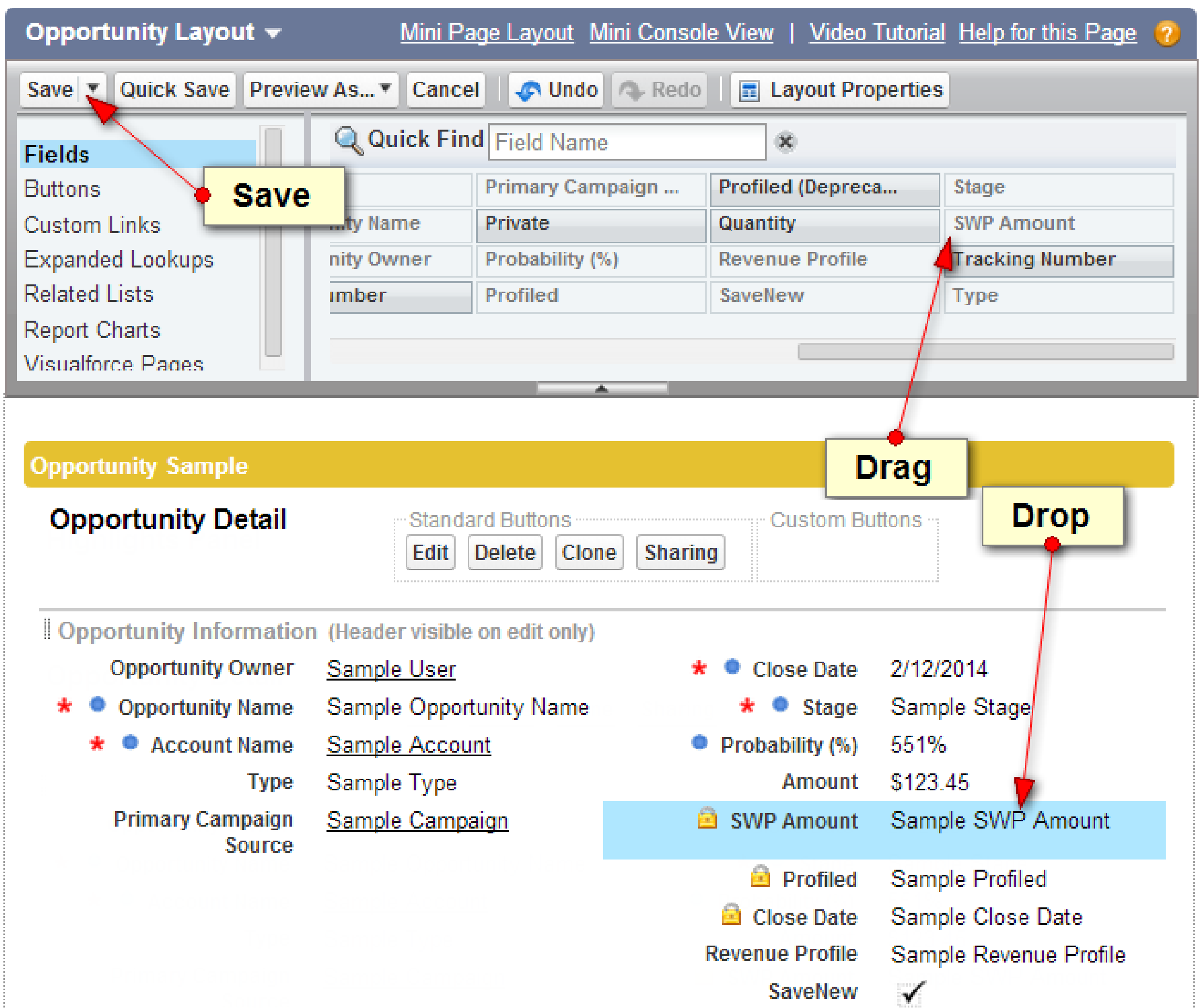
a. Go to Setup > App Setup > Customize > Opportunities > Page Layout(s)

b. If presented with multiple page layouts to choose from, click the Edit link next to the layout named “Opportunity Layout”. (This step applies to only some editions of Salesforce)

c. Drag & Drop the following list of fields from “Opportunity Layout” “Fields” section at the top to the Opportunity Sample section labeled “Opportunity Information”:

- SWP Amount
- Profiled
- Close Date (both fields if 2 are listed)
- Revenue Profile
- SaveNew

d. Click the “Save” button in the Opportunity Layout section to save the layout.

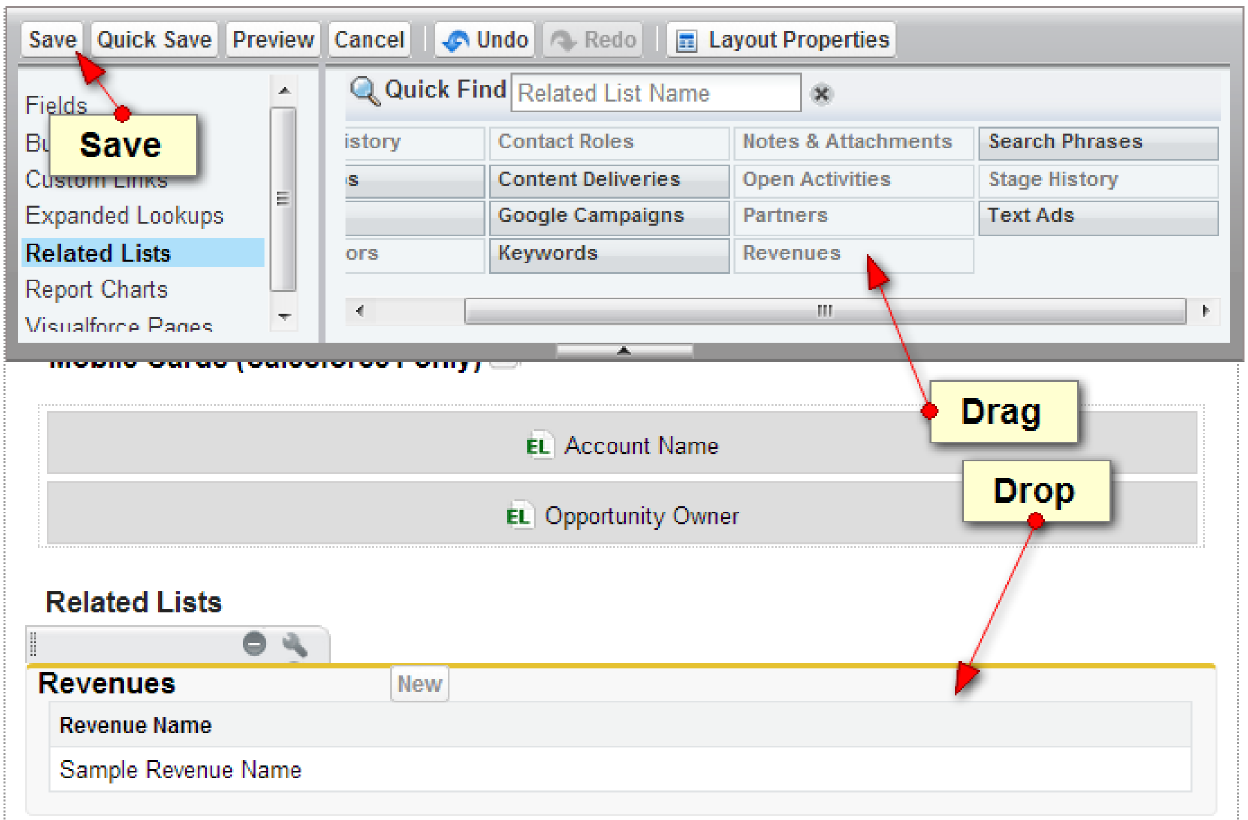


4. Add the "Revenues" Related List to the Opportunity Page Layout

a. From the same location as the previous step, select "Related Lists" from the Opportunity Layout menu.

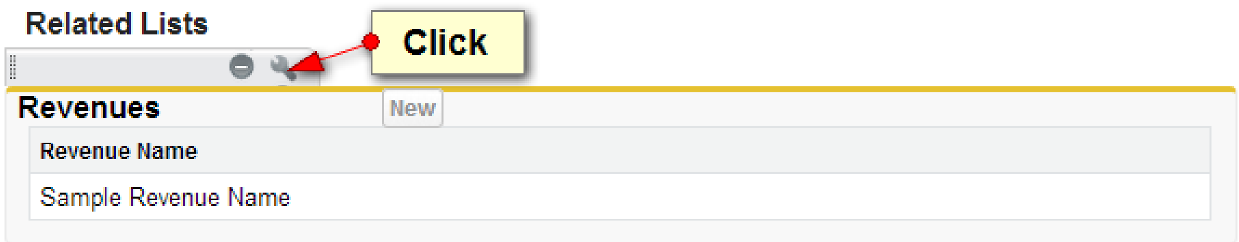
b. Drag & Drop the "Revenues" list from "Opportunity Layout" section at the top to the Opportunity Sample layout below it.

c. Click "Save" to save the layout.

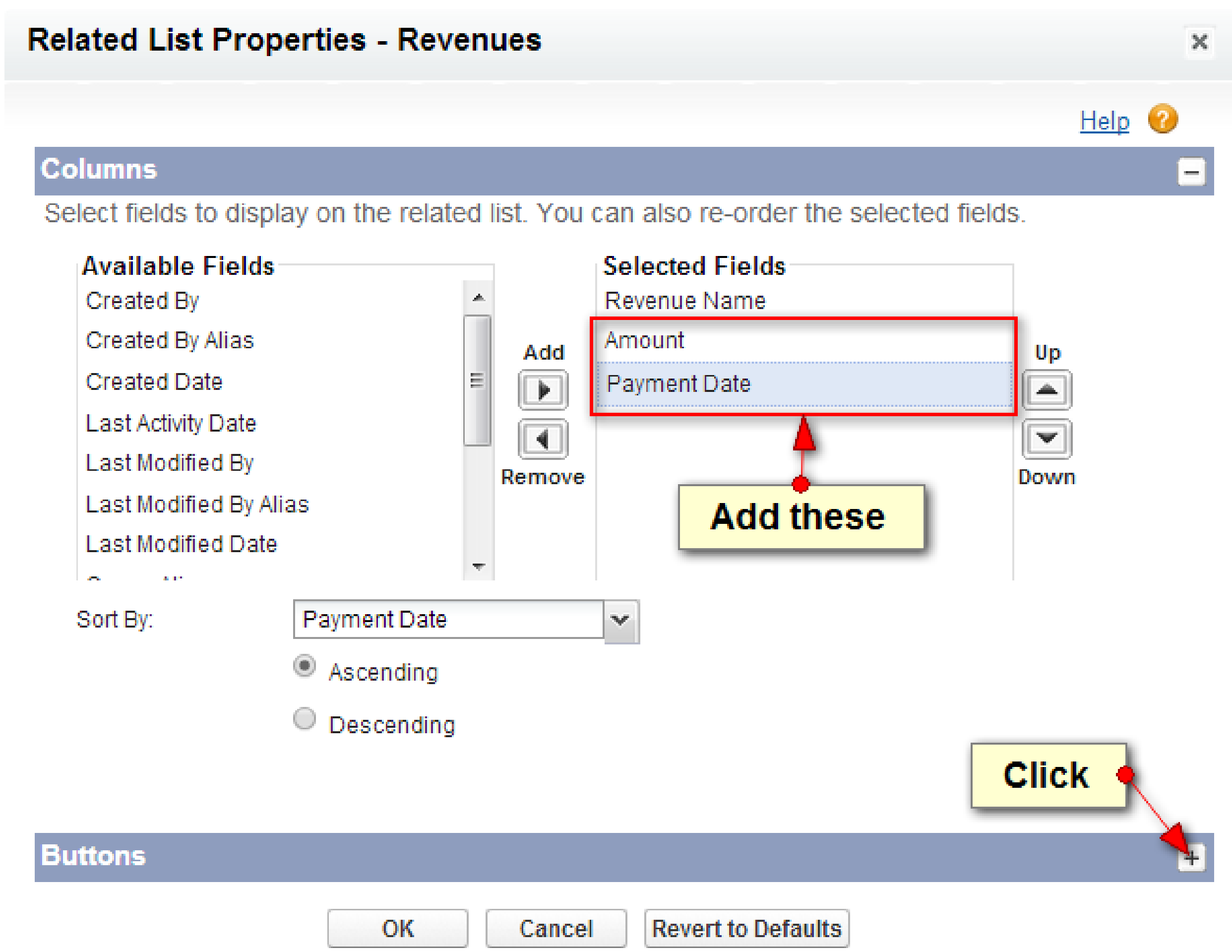


5. **Modifying the Revenues List section in Opportunity detail pages.**

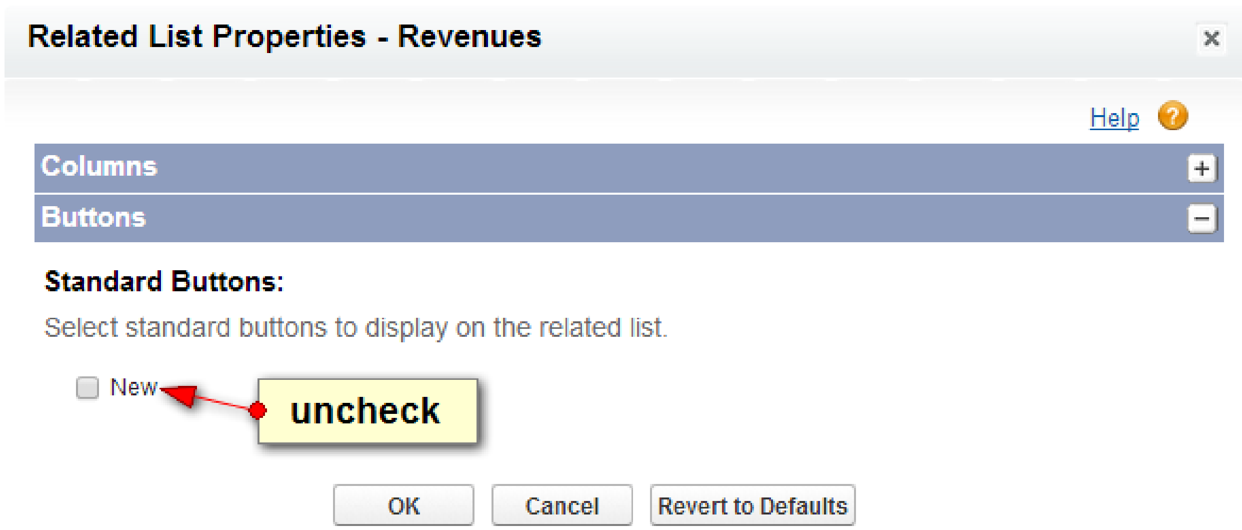
   a. From the same "Opportunity Layout" page as the previous step, scroll down to the Revenues section you just added to the Opportunity Sample Layout and click the "wrench" icon.



   b. Move the "Amount" & "Payment Date" fields from "Available Fields" to "Selected Fields".
   c. Select "Payment Date" from the Sort By: drop-down list.
   d. Click the '+' button to expand the "Buttons" section as seen below.



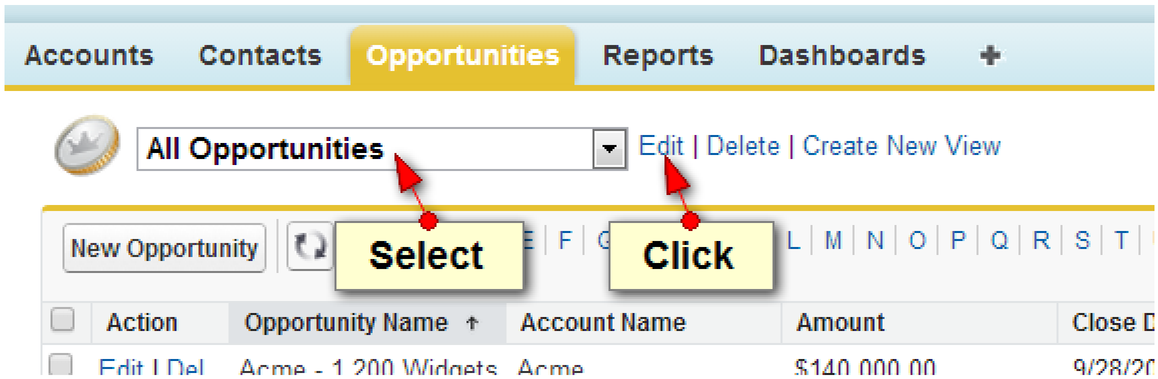
e. Uncheck the “New” checkbox and click the “OK” button.



f. Click “OK” to close the dialog

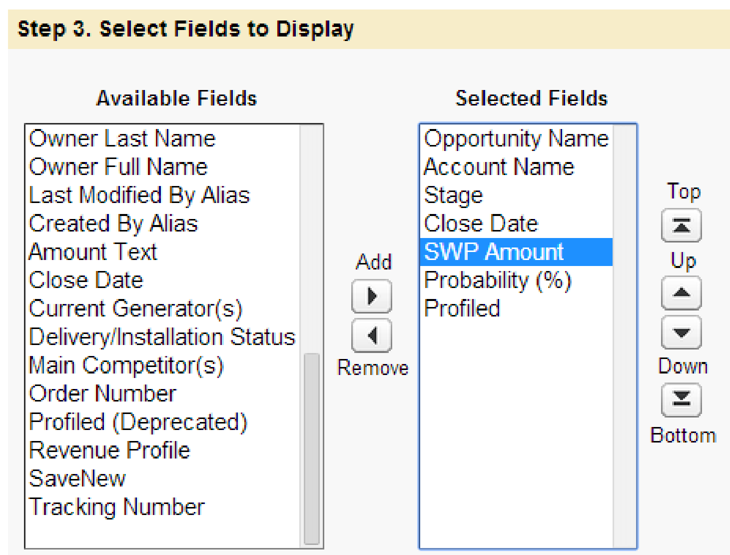
g. Click “Save” to save the Opportunity Layout change.

6. **Add the SalesWIP "Profiled" column to Opportunity list views. This field indicates whether a given opportunity has had the SalesWIP profiling done to it or not.**
   a. Go to the Opportunities tab and select the view you wish to edit from the drop-down list.
   b. Click the "Edit" link.



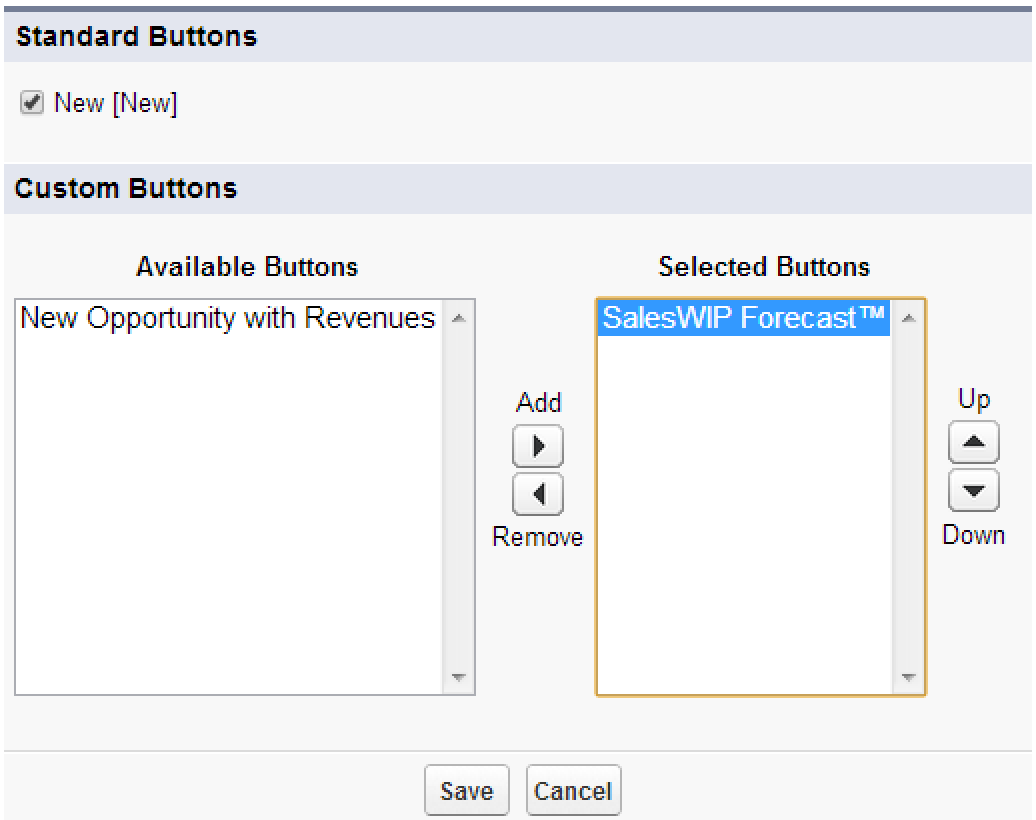
   c. In the section labeled "Step 3. Select Fields to Display" move the field called "Profiled" from the Available Fields list to the Selected Fields list. Also add other fields as needed.

   Recommended:
   - Opportunity Name
   - Account Name
   - Stage
   - Close Date
   - SWP Amount
   - Probability (%)

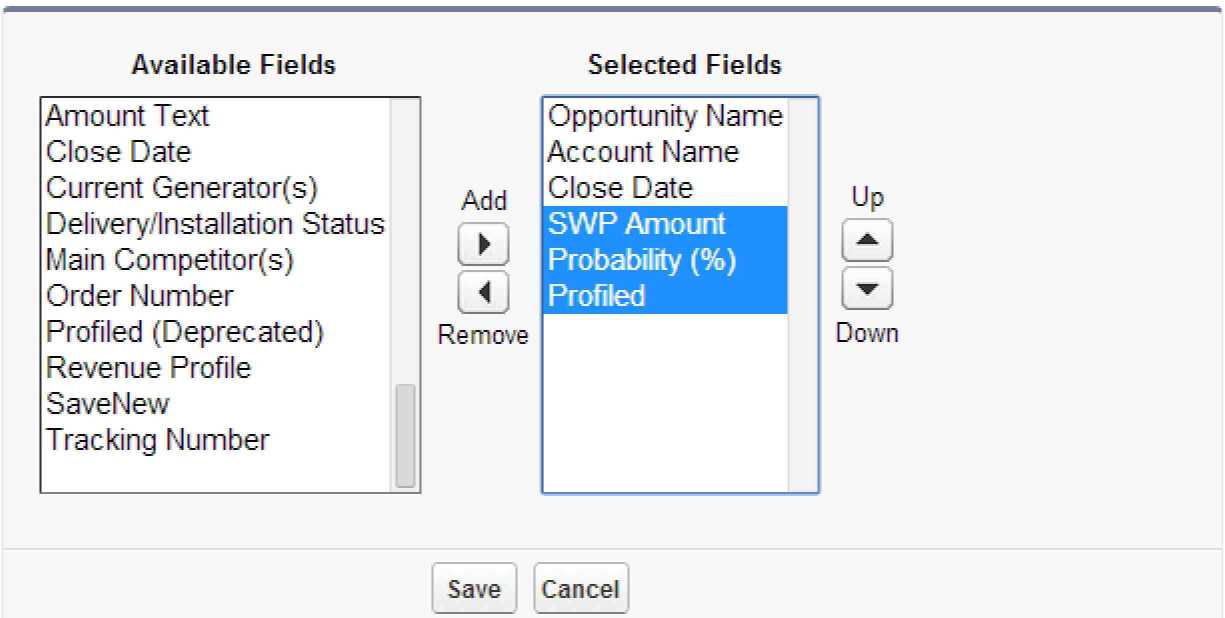


   d. Click "Save".
   e. Repeat steps a) through d) for all Opportunity views.

7. **Add the "SalesWIP Forecast" button to the Opportunity list view.**
   a. Go to Setup > App Setup > Customize > Opportunities > Search Layouts
   b. Click on the Edit link next to the "Opportunities List View" layout.
   c. Move the item labeled "SalesWIP Forecast™" from the "Available Buttons" column to the "Selected Buttons" column.
   d. Click "Save" to save the changes.

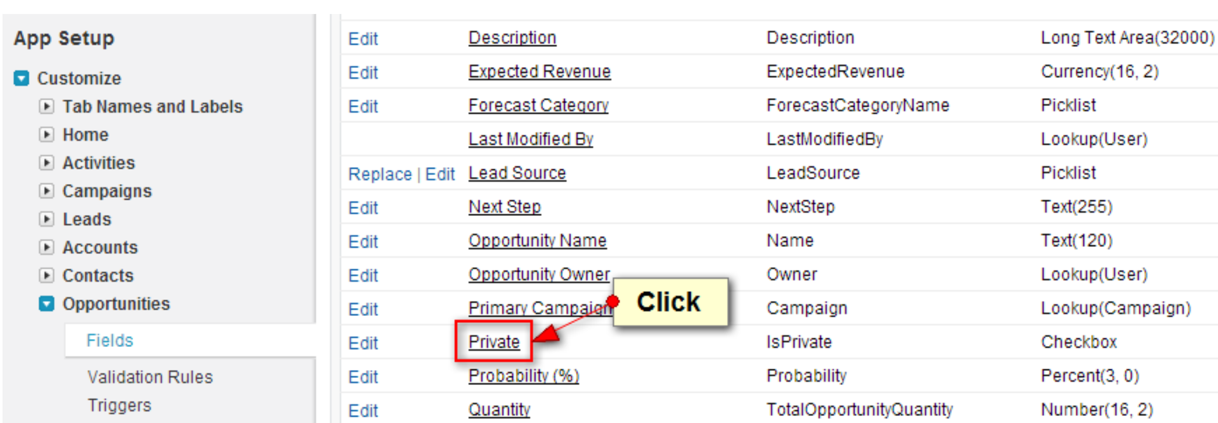


8. **Add SalesWIP opportunity details fields to the Recent Opportunity list view.**
    a. Go to Setup > App Setup > Customize > Opportunities > Search Layouts
    b. Click on the Edit link next to the “Opportunities Tab” layout.
    c. Move the following fields from the Available Fields list to the Selected Fields list. Also add other fields as needed. Recommended:
        - SWP Amount
        - Probability (%)

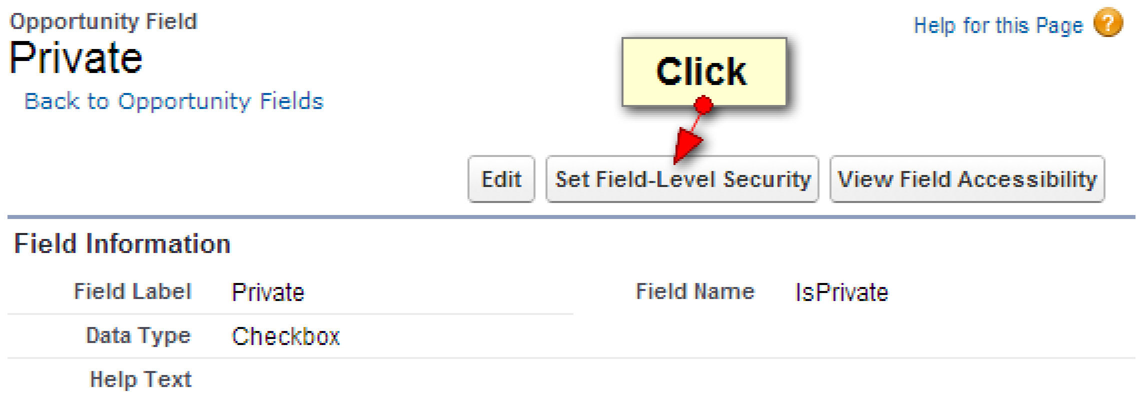


9. **[Enterprise Edition Only] Allow SalesWIP access to Opportunity isPrivate field.**
NOTE: Errors will be thrown if this step is not completed for Enterprise Edition users

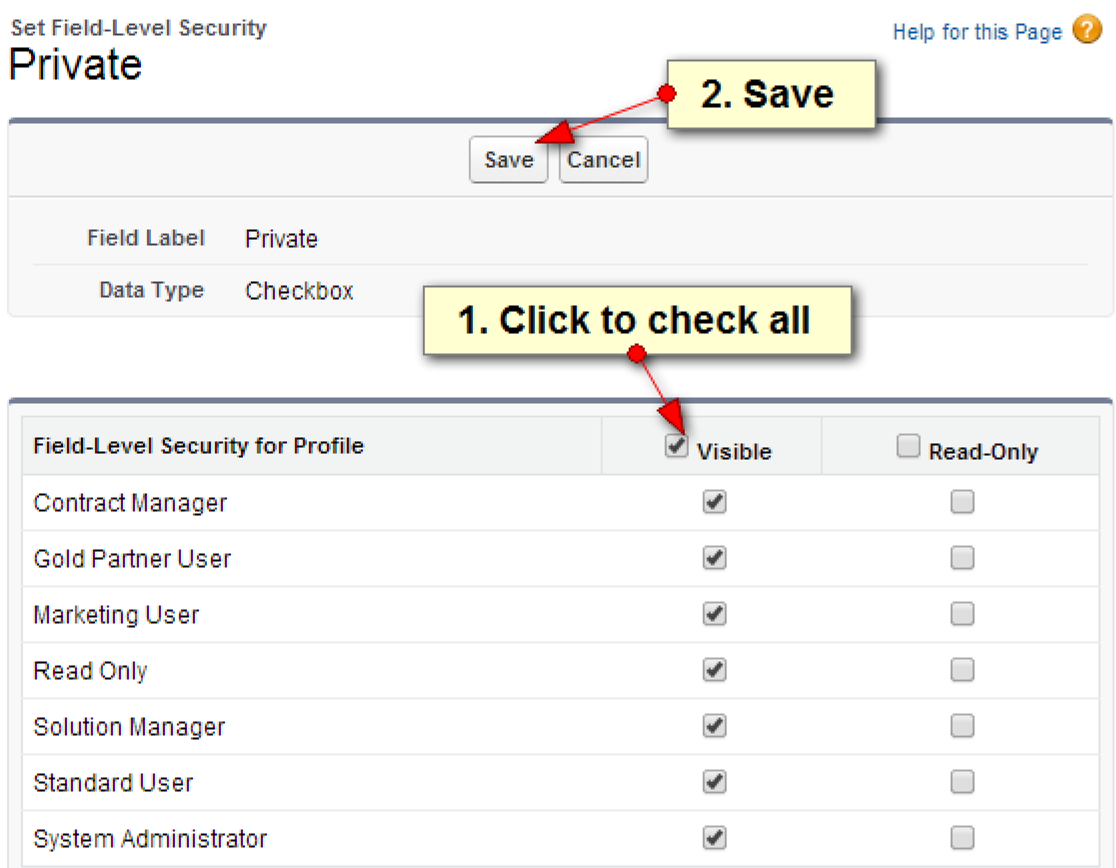
    a. Go to Setup > App Setup > Customize > Opportunities > Fields
    b. In the Opportunity Standard Fields section, click on the field labeled “Private”



c. Click the button labeled "Set Field-Level Security"



d. Make the field "visible" for all users and save.



Support

Should you need any assistance installing this app please contact:

+1 (919) 336-4096 **support@saleswip.com**