

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.

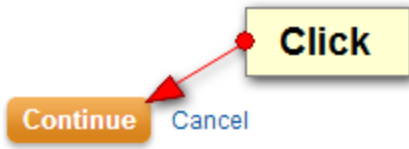
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tG00000000Wee7>

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.

Package Installation Details

[Help for this Page](#) ?

Package Name	SalesWIP
Version Name	SalesWIP Feb 2014
Version Number	1.9
Publisher	SalesWIP LLC
Description	



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

**Install Complete**

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

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.

Override Properties Save Cancel

Label

View

Name

View

Default

Standard Salesforce.com Page

Override With

☐ No Override (use default)
☒ Visualforce Page OpportunityDetail [saleswip_app__OpportunityDetail]

Comment

Save Cancel

- 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

- Go to Setup > App Setup > Customize > Opportunities > Page Layout(s)
- 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)
- 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
- Click the "Save" button in the Opportunity Layout section to save the layout.

The screenshot shows the Salesforce Opportunity Layout editor. At the top, the "Opportunity Layout" header includes navigation links: Mini Page Layout, Mini Console View, Video Tutorial, and Help for this Page. Below the header is a toolbar with buttons: Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. A red arrow points from the "Save" button to a yellow "Save" callout box.

The main area is divided into two sections. The top section, "Opportunity Sample", contains a "Fields" list on the left and a table of fields on the right. The "Fields" list includes: Buttons, Custom Links, Expanded Lookups, Related Lists, Report Charts, and Visualforce Pages. The table of fields has columns: Field Name, Primary Campaign ..., Profiled (Depreca..., Stage, Quantity, SWP Amount, Tracking Number, and Type. A red arrow points from the "SWP Amount" field in the table to a yellow "Drag" callout box.

The bottom section, "Opportunity Detail", contains a "Standard Buttons" group (Edit, Delete, Clone, Sharing) and a "Custom Buttons" group. Below this is the "Opportunity Information" section, which is a table of fields. A red arrow points from the "SWP Amount" field in the table to a yellow "Drop" callout box.

The "Opportunity Information" table contains the following fields:

Opportunity Information (Header visible on edit only)			
Opportunity Owner	Sample User	* ● Close Date	2/12/2014
* ● Opportunity Name	Sample Opportunity Name	* ● Stage	Sample Stage
* ● Account Name	Sample Account	● Probability (%)	551%
Type	Sample Type	Amount	\$123.45
Primary Campaign Source	Sample Campaign	SWP Amount	Sample SWP Amount
		Profiled	Sample Profiled
		Close Date	Sample Close Date
		Revenue Profile	Sample Revenue Profile
		SaveNew	☒

4. Add the “Revenues” Related List to the Opportunity Page Layout

- From the same location as the previous step, select “Related Lists” from the Opportunity Layout menu.
- Drag & Drop the “Revenues” list from “Opportunity Layout” section at the top to the Opportunity Sample layout below it.
- Click “Save” to save the layout.

The screenshot displays the Salesforce Opportunity Page Layout editor. At the top, a toolbar includes buttons for 'Save', 'Quick Save', 'Preview', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. A red arrow points to the 'Save' button, which is highlighted with a yellow 'Save' callout box. Below the toolbar, a 'Quick Find' search bar is set to 'Related List Name'. A table lists various related lists: History, Contact Roles, Notes & Attachments, Search Phrases, Leads, Content Deliveries, Open Activities, Stage History, Opportunities, Google Campaigns, Partners, Text Ads, Keywords, and Revenues. A red arrow points to the 'Revenues' entry in this table, with a yellow 'Drag' callout box. Below the table, the current page layout is shown, featuring 'Account Name' and 'Opportunity Owner' fields. A yellow 'Drop' callout box is positioned over the 'Opportunity Owner' field. At the bottom, the 'Related Lists' section is visible, showing a 'Revenues' related list with a 'New' button and a sample revenue name 'Sample Revenue Name'. A red arrow points from the 'Revenues' entry in the table to this section.

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.

Related Lists

Revenues New

Revenue Name

Sample Revenue Name

Click

- 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.

Related List Properties - Revenues Help ?

Columns

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields

- Created By
- Created By Alias
- Created Date
- Last Activity Date
- Last Modified By
- Last Modified By Alias
- Last Modified Date

Selected Fields

- Revenue Name
- Amount
- Payment Date

Add these

Sort By: Payment Date

☒ Ascending

☐ Descending

Buttons

Click

OK Cancel Revert to Defaults

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

Related List Properties - Revenues [Close]

[Help](#) [?]

Columns	+
Buttons	-

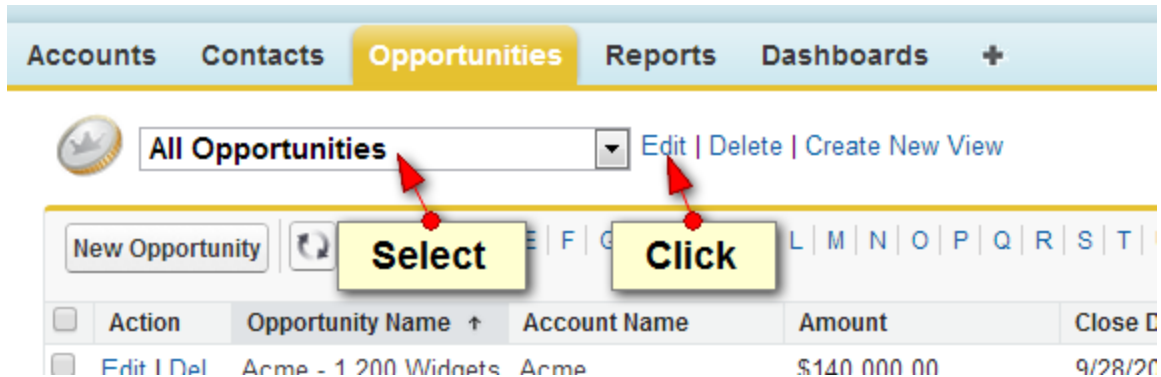
Standard Buttons:
Select standard buttons to display on the related list.

☐ New **uncheck**

OK Cancel Revert to Defaults

- 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.

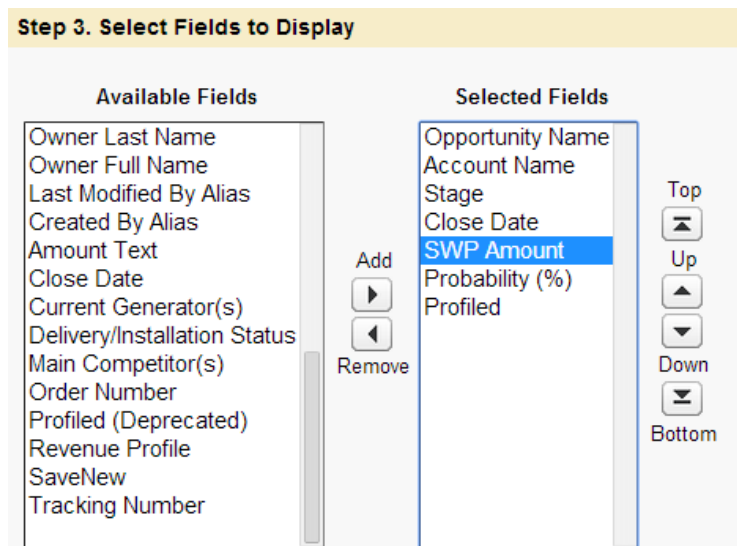


- c. In the section labeled “Step 3. Select Fields to Display” move the field called “Profiled” from the Available Fields list to the Selected Fields list. Also add other fields as needed.

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.

The screenshot displays the Salesforce button configuration interface. At the top, under the **Standard Buttons** section, there is a checked checkbox for **New [New]**. Below this is the **Custom Buttons** section, which is divided into two columns: **Available Buttons** and **Selected Buttons**.

In the **Available Buttons** column, the button **New Opportunity with Revenues** is listed. In the **Selected Buttons** column, the button **SalesWIP Forecast™** is listed and highlighted with a blue background. Between the two columns are two buttons: **Add** (with a right-pointing arrow) and **Remove** (with a left-pointing arrow). To the right of the **Selected Buttons** column are two buttons: **Up** (with an up-pointing arrow) and **Down** (with a down-pointing arrow). At the bottom of the interface are **Save** and **Cancel** buttons.

8. Add SalesWIP opportunity details fields to the Recent Opportunity list view.

- Go to Setup > App Setup > Customize > Opportunities > Search Layouts
- Click on the Edit link next to the “Opportunities Tab” layout.
- Move the following fields from the Available Fields list to the Selected Fields list. Also add other fields as needed. Recommended:
 - SWP Amount
 - Probability (%)

Available Fields

- Amount Text
- Close Date
- Current Generator(s)
- Delivery/Installation Status
- Main Competitor(s)
- Order Number
- Profiled (Deprecated)
- Revenue Profile
- SaveNew
- Tracking Number

Selected Fields

- Opportunity Name
- Account Name
- Close Date
- SWP Amount
- Probability (%)
- Profiled

Buttons: Add, Remove, Up, Down, Save, Cancel

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

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

App Setup

- Customize
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts
 - Contacts
 - Opportunities
 - Fields**
 - Validation Rules
 - Triggers

Edit	Description	Description	Field Type
Edit	Expected Revenue	ExpectedRevenue	Currency(16, 2)
Edit	Forecast Category	ForecastCategoryName	Picklist
	Last Modified By	LastModifiedBy	Lookup(User)
Replace Edit	Lead Source	LeadSource	Picklist
Edit	Next Step	NextStep	Text(255)
Edit	Opportunity Name	Name	Text(120)
Edit	Opportunity Owner	Owner	Lookup(User)
Edit	Primary Campaign	Campaign	Lookup(Campaign)
Edit	Private	IsPrivate	Checkbox
Edit	Probability (%)	Probability	Percent(3, 0)
Edit	Quantity	TotalOpportunityQuantity	Number(16, 2)

- c. Click the button labeled “Set Field-Level Security”

Opportunity Field Help for this Page ?

Private

[Back to Opportunity Fields](#)

Click

Edit Set Field-Level Security View Field Accessibility

Field Information

Field Label	Private	Field Name	IsPrivate
Data Type	Checkbox		
Help Text			

- d. Make the field “visible” for all users and save.

Set Field-Level Security Help for this Page ?

Private

2. Save

Save Cancel

Field Label	Private
Data Type	Checkbox

1. Click to check all

Field-Level Security for Profile	☒ Visible	☐ Read-Only
Contract Manager	☒	☐
Gold Partner User	☒	☐
Marketing User	☒	☐
Read Only	☒	☐
Solution Manager	☒	☐
Standard User	☒	☐
System Administrator	☒	☐

Support

Should you need any assistance installing this app please contact:

+1 (919) 336-4096

support@saleswip.com