

Account Team Management

Installation & Setup Guide

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Pre-Installation ...

Step 1 - Confirm Prerequisites

Before the Account Team Management application can be installed, the following prerequisites are required:

Account Teams must be enabled.

Sharing Settings have the most restrictive defaults for the Account, Contact, Opportunity and Case objects.

The next two screenshots cover these requirements.

1st - Enable Account Teams (Setup > Customize > Accounts > Account Teams):

Account Team Setup[Help for this Page](#) ?

Enable or disable account team functionality. Disabling teams will remove all users' default account teams and existing account teams on accounts.

☒ Account Teams Enabled

2nd - Verify that teams have been enabled properly:

Account Team Setup[Help for this Page](#) ?

Enable or disable the ability to define account teams and use teams for accounts.

Team Roles

Define the roles for account teams and opportunity sales teams

Replace Team Roles

Update the names of existing team roles

Disable Account Teams

Turn off account teams for your organization

1st - Configure Sharing Settings (Setup > Security Controls > Sharing Settings):

Sharing Settings

[Help for this Page](#) ?

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data.

Manage sharing settings for:

All Objects



Default Sharing Settings

Organization-Wide Defaults

Edit

[Organization-Wide Defaults Help](#)



Object	Default Access	Grant Access Using Hierarchies
Lead	Private	☒
Account, Contract and Asset	Private	☒
Contact	Private	☒
Opportunity	Private	☒
Case	Private	☒
Campaign	Private	☒
Activity	Private	☒
Calendar	Hide Details and Add Events	☒
Price Book	Use	☒
Account Team Change	Controlled by Parent	
Account Team Change Request	Private	☒

Step 2 - Select A Version

There are two versions of the Account Team Management application available to install, each of which has different benefits and drawbacks.

Managed Version

Benefits

- Easy upgrade path for bug-fix and major releases. No removal or potential loss of data required to install an updated version.
- Licensed context allows for premium support.
- Intended for environments with limited desire or capability to manage third-party applications.
- Open Source version can be installed in a sandbox environment to overcome the source-code visibility issue.

Drawbacks

- Limited modification by internal administrators and developers is allowed, due to the managed package nature.
- Source code is hidden, and code changes not possible.

Unmanaged/Open Source Version

Benefits

- Complete visibility and control over all configuration and code aspects.
- Easy to extend or modify with in-house developers.

Drawbacks

- Not possible to easily upgrade to future bug-fix and major releases. Will require manual developer patching and/or complete re-installation.
- No support options are available, due to the possibility for installed environments to deviate from the official, supportable version.

Step 3 - Install The Application

To install the Managed version:

<https://sites.secure.force.com/appexchange/listingDetail?listingId=a0N30000001wuNbEAI>

To install the Unmanaged/Open-Source version:

<https://sites.secure.force.com/appexchange/listingDetail?listingId=a0N30000001wuNqEAI>

Click the **Get It Now** button on either page:



Post-Installation ...

Step 4 - Manage Custom Settings

The Salesforce.com Winter 10 release included the general availability of a new Custom Settings functionality.

This application takes advantage of custom settings to provide for even more granular management of which users, roles &/or profiles are allowed to access specific parts of the Account Team Management process.

Using custom settings, you have the ability to define a hierarchy of roles, and restrict the ability to edit Account, Contact, Opportunity, and Case permissions.

Step 4 - Manage Custom Settings

There is only one required configuration step:

Set an organization-wide default for the Account Team Management administration settings object.

If desired, you can additionally setup your permission hierarchy now as well, to control which users and roles are allowed to change different account sharing rules.

The next screenshots only cover the required step.

Custom Settings

[Help for this Page](#) ?

Custom settings enable organizations to create and manage custom data at the organization, profile, and user levels.

Custom settings data is stored in the application cache, enabling efficient access without the cost of repeated queries. This data can then be leveraged by formula fields, s-controls, Apex, and the Force.com Web Services API.

View: All ▾ [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

New					
Action	Label 	Visibility	Settings Type	Namespace Prefix	Description
Manage 	AdministrativeSettings	Public	Hierarchy	PickleATM	

Create the fields for your custom settings. The data in these fields is cached with the application.

Custom Setting Detail		Manage	
Label	AdministrativeSettings	Object Name	AdministrativeSettings
API Name	PickleATM__AdministrativeSettings__c	Setting Type	Hierarchy ▾
Visibility	Public ▾	Description	
Namespace Prefix	PickleATM	Created Date	11/28/2009 12:59 PM
Last Modified Date	11/28/2009 12:59 PM		

Custom Fields		New		
Action	Field Label	Installed Package	Data Type	Modified By
Edit	 Enable Account Access Changes?	Account Team Management	Checkbox	Ian Zepp , 11/28/2009 12:59 PM
Edit	 Enable Case Access Changes?	Account Team Management	Checkbox	Ian Zepp , 11/28/2009 12:59 PM
Edit	 Enable Contact Access Changes?	Account Team Management	Checkbox	Ian Zepp , 11/28/2009 12:59 PM
Edit	 Enable Opportunity Access Changes?	Account Team Management	Checkbox	Ian Zepp , 11/28/2009 12:59 PM

Provide values for the fields you created. This data is cached with the application.

Edit AdministrativeSettings

Save

Cancel

AdministrativeSettings Information**I = Required Information**

Location	<u>Pickle Software (Demos)</u>
Enable Account Access Changes?	☒
Enable Case Access Changes?	☒
Enable Contact Access Changes?	☒
Enable Opportunity Access Changes?	☒
Enable Process Tests?	☒
Enable Team Member Role Changes?	☒

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

Edit Delete			
▼ Default Organization Level Value			
Location	Pickle Software (Demos)	Enable Account Access Changes?	☒
Enable Case Access Changes?	☒	Enable Contact Access Changes?	☒
Enable Opportunity Access Changes?	☒	Enable Process Tests?	☒
Enable Team Member Role Changes?	☒		

Step 5 - Update Account Layout

The application includes one custom button and one custom link named 'Manage Account Team', both on the Account object.

In order to configure the application properly, you will need to add one of the custom buttons/links to at least one Account Page Layout.

If you installed the Managed version, you can also bring up the management page using a direct URL reference:

`https://<hostname>/apex/pickleatm__account_manageteam?id=<accountId>`

This page allows you to create different page layouts to display Account data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Account Page Layouts

[New](#)[Page Layout Assignment](#)

Action	Page Layout Name	Created By	Modified By
Edit Del	Account (Marketing) Layout	Ian Zepp , 11/28/2009 12:31 PM	Ian Zepp , 11/28/2009 12:44 PM
Edit Del	Account (Sales) Layout	Ian Zepp , 11/28/2009 12:31 PM	Ian Zepp , 11/28/2009 12:44 PM
Edit Del	Account (Support) Layout	Ian Zepp , 11/28/2009 12:31 PM	Ian Zepp , 11/28/2009 12:44 PM
Edit Del	Account Layout	Ian Zepp , 11/28/2009 12:31 PM	Ian Zepp , 11/28/2009 1:13 PM

Account Layout ▾

[Mini Page Layout](#) [Mini Console View](#) | [Video Tutorial](#) [Help for this Page](#) ?

Save ▾

Quick Save

Preview As... ▾

Cancel

Undo

Redo

Layout Properties

Fields

Buttons

Custom Links

Visualforce Pages

Custom S-Controls

Related Lists

Quick Find

Delete

Enable As Partner

Submit for Approval

Disable Customer ..

Include Offline

Disable Partner A...

Manage Account Te

Edit

Sharing

Account Sample

Account Detail

Standard Buttons

Edit

Delete

Sharing

Include Offline

Enable As Partner

Disable Customer Portal Account

Disable Partner Account

Custom Buttons

Account Information (Header visible on edit only)

Account Owner Sample User

Rating Sample Rating

* Account Name Sample Account Name

Phone 1-415-555-1212

Parent Account Sample Account

Fax 1-415-555-1212

Account Number Sample Account Number

Website www.salesforce.com

Account Site Sample Account Site

Ticker Symbol Sample Ticker Symbol

Account Layout ▾

[Mini Page Layout](#) [Mini Console View](#) | [Video Tutorial](#) [Help for this Page](#) ?

Save ▾

Quick Save

Preview As... ▾

Cancel

Undo

Redo

Layout Properties

Fields

Buttons

Custom Links

Visualforce Pages

Custom S-Controls

Related Lists

Quick Find

Delete

Enable As Partner

Submit for Approval

Disable Customer ..

Include Offline

Disable Partner A...

Manage Account Te

Edit

Sharing

Custom Button

Label: Manage Account Team

Name: PickleATM__Account_ManageTeamButton

Account Sample

Account Detail

Standard Buttons

Edit

Delete

Sharing

Include Offline

Enable As Partner

Disable Customer Portal Account

Disable Partner Account

Custom Buttons

Account Information (Header visible on edit only)

Account Owner Sample User

Rating Sample Rating

* Account Name Sample Account Name

Phone 1-415-555-1212

Parent Account Sample Account

Fax 1-415-555-1212

Account Number Sample Account Number

Website www.salesforce.com

Account Site Sample Account Site

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Account Layout ▾

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Save ▾

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Related Lists

Quick Find

Delete

Enable As Partner

Submit for Approval

Disable Customer ..

Include Offline

Disable Partner A...

Manage Account Te...

Edit

Sharing

Account Sample

Account Detail

Standard Buttons

Edit

Delete

Sharing

Include Offline

Enable As Partner

Disable Customer Portal Account

Disable Partner Account

Custom Buttons



Custom Button: Manage Account Team

Account Information (Header visible on edit only)

Account Owner Sample User

Rating Sample Rating

* Account Name Sample Account Name

Phone 1-415-555-1212

Parent Account Sample Account

Fax 1-415-555-1212

Account Number Sample Account Number

Website www.salesforce.com

Account Site Sample Account Site

Ticker Symbol Sample Ticker Symbol

**Account
Master Account**[Printable View](#) | [Customize Page](#) | [Edit Layout](#) | [Help for this Page](#) ?[Account Team \[0\]](#) | [Contacts \[0\]](#) | [Opportunities \[0\]](#) | [Cases \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) |
[Notes & Attachments \[0\]](#) | [Partners \[0\]](#)**Account Detail**

Edit

Delete

Sharing

Include Offline

Manage Account Team

Account Owner [Ian Zepp \[Change\]](#)**Rating****Account Name** Master Account [\[View Hierarchy\]](#)**Phone****Parent Account****Fax****Account Number****Website****Account Site****Ticker Symbol****Type****Ownership****Industry****Employees****Annual Revenue****SIC Code****Billing Address****Shipping Address****Created By** [Ian Zepp](#), 11/28/2009 1:10 PM**Last Modified By** [Ian Zepp](#), 11/28/2009 1:10 PM**Description****Custom Links** [Billing](#)

Manage Account Team

Edit

Delete

Sharing

Include Offline

Manage Account Team

**Account Team**

Add

Add Default Team

[Account Team Help](#) ?

No team members

Step 6 - Add Approval Process

In order for the Account Team Management application to work properly, an approval process must be setup.

Unfortunately, it is not currently possible to package an approval process and include it in the AppExchange download, so this is a required step for all installations.

The following tutorial and screenshots walk through this process.

Step 6 - Add Approval Process

The first step is to create the initial approval process:

- Open the 'Setup > Create > Workflow & Approvals > Approval Processes' page
- Change the 'Manage Approval Process For:' to 'Account Team Change Request'
- Click on 'Create New Approval Process' and select 'Use Jump Start Wizard'
- In the 'Name' field, enter 'ChangeRequest_Approval'
- In the 'Unique Name' field, enter 'ChangeRequest_Approval'
- Click the checkbox next to 'Add the Approval History related list to all Account Team Change Request page layouts'.
- Under the entry criteria, enter the following in the first row:
 - Field = Approval Status
 - Operator = Equals
 - Value = Draft, Rejected
- Under the 'Select Approver' section, choose the 'Automatically assign to approver(s)' option
 - Change the picklist option from 'User' to 'Related User'
 - In the new picklist that appears, choose 'Approver'
- Click the Save button.

Step 6 - Add Approval Process

With the approval process has been created, you will now need to add the proper workflow field updates to each section.

- Under the 'Initial Submission Actions', click the 'Add Existing' button
 - Change the action type to 'Field Update'
 - Click the 'Field Update: ChangeRequest_SetInReview' line
 - Click the add arrow button to move the field update to the 'Selected Actions' section
 - Click the Save button.
- Under the 'Final Approval Actions', click the 'Add Existing' button
 - Change the action type to 'Field Update'
 - Click the 'Field Update: ChangeRequest_SetApproved' line
 - Click the add arrow button to move the field update to the 'Selected Actions' section
 - Click the Save button.
- Under the 'Final Rejection Actions', click the 'Add Existing' button
 - Change the action type to 'Field Update'
 - Click the 'Field Update: ChangeRequest_SetRejected' line
 - Click the add arrow button to move the field update to the 'Selected Actions' section
 - Click the Save button.
- Under the 'Recall Actions', click the 'Add Existing' button
 - Change the action type to 'Field Update'
 - Click the 'Field Update: ChangeRequest_SetDraft' line
 - Click the add arrow button to move the field update to the 'Selected Actions' section
 - Click the Save button.

Step 6 - Add Approval Process

Now that you have fully setup the approval process, click the 'Activate' button.

At this time, you should enable the custom setting 'Enable Process Tests' and re-run all test classes to ensure that the approval process is working properly.

Licensing & Support Info

Licensing Information

At present, this application is available on a "Licensed but Free To Use" basis. When installing for the first time, you will be granted an automatic trial, 90-day, site-wide license at no cost.

This is done to ensure that inactive installations can be expired on a timely basis. Please contact us at any time to have the trial license converted to a permanent license.

Support Information

For a Managed installation, premium support contracts are available. For general questions, feedback, or to arrange for a support contract, please contact:

Ian Zepp, RHCE

support@picklesoftware.com

An Unmanaged/Open Source installation is officially "unsupported", but we are always open to hearing your comments, feedback, and accepting bug reports at the same email address.