

Renewal Management Free Installation Guide

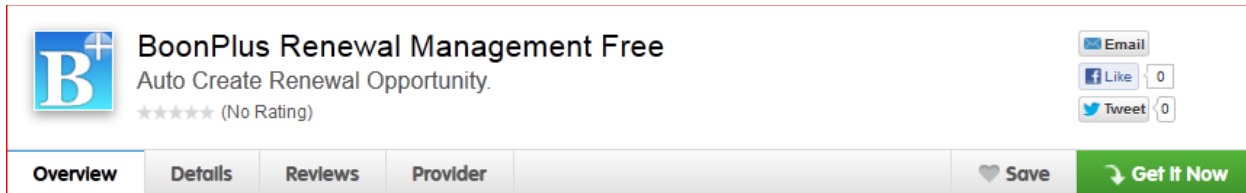
Last updated: Aug 2012

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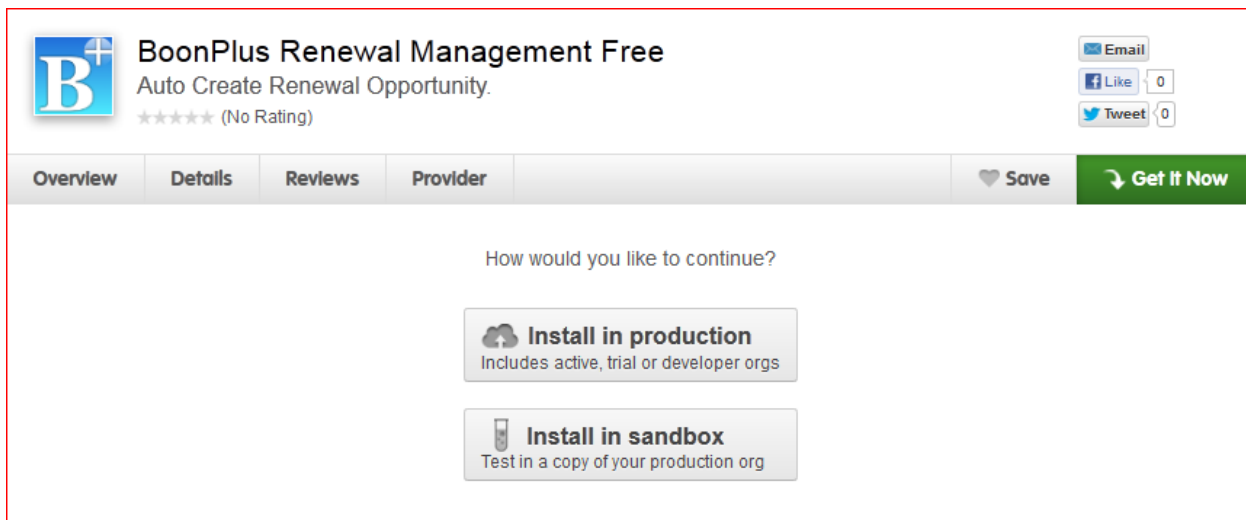
Installation

Step 1: Install Package

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



- Select an org for the installation.



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



BoonPlus Renewal Management Free
Auto Create Renewal Opportunity.
★★★★★ (No Rating)

EmailLike 0Tweet 0

OverviewDetailsReviewsProviderSaveGet It Now

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 Free	ORGANIZATION BoonPlus
VERSION BoonPlus Renewal Management Free (F20120825 / 1.3.0)	EDITION Enterprise Edition
SUBSCRIPTION Free	USER NAME free.admin@boonplus.com.testfree
DURATION Does Not Expire	
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 Free
Version Name	F20120825
Version Number	1.3
Publisher	BoonPlus
Description	BoonPlus Renewal Management Free allows Sales/Renewal reps to create Renewal Opportunities automatically.

ContinueCancel

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

Package Installer

[Help for this Page ?](#)

BoonPlus Renewal Management Free

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

Documents	☒ ☒ ☒ ☒	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

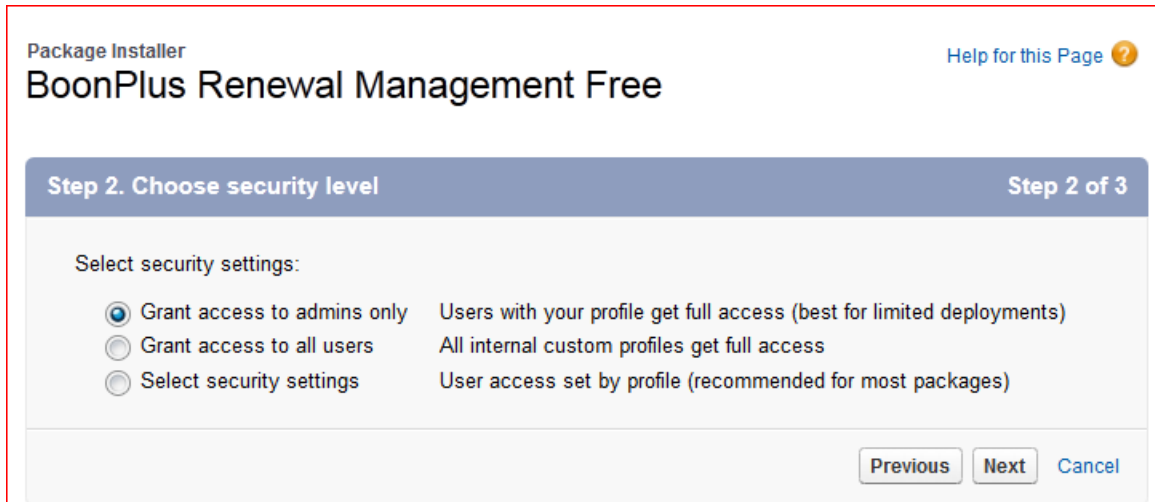
This Package will be able to use all of the Administrative Privileges from the user's Profile.

Next

Cancel

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- Click on the “**Next**” button on the “Step 2” page.



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

BoonPlus Renewal Management Free

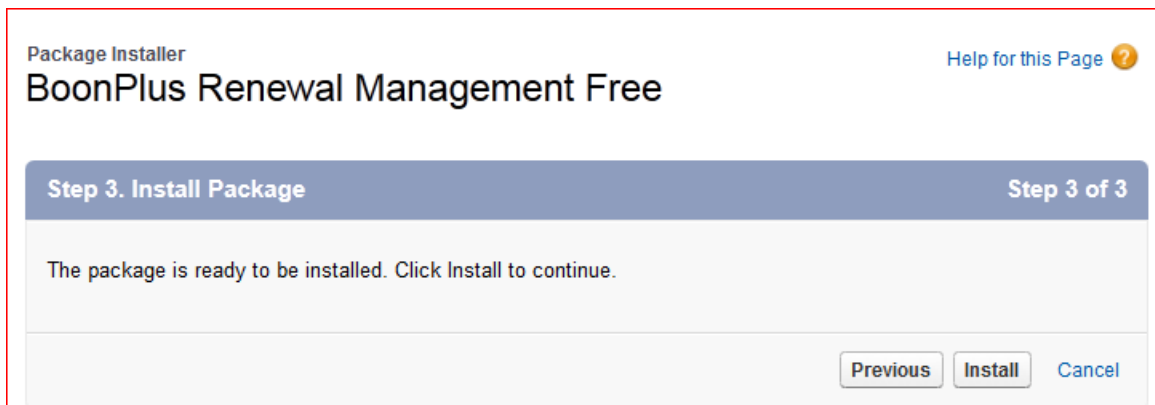
Step 2. Choose security level Step 2 of 3

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 Free

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 Free (Managed)

[« Back to List: Users](#)

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

Installed Package Detail

[Uninstall](#) [View Components](#) [Configure](#) [View Dependencies](#)

Package Name	BoonPlus Renewal Management Free	Version Number	1.3
Language	English	First Installed Version Number	1.3
Version Name	F20120825	Package Type	Managed
Namespace Prefix	bpfr	API Access	Unrestricted [Enable Restrictions]
Publisher	BoonPlus	Modified By	Free Admin , 8/25/2012 6:27 PM
Description	BoonPlus Renewal Management Free allows Sales/Renewal reps to create Renewal Opportunities automatically.		
Installed By	Free Admin , 8/25/2012 6:27 PM		

Step 2: Page Layout Customization

- Administrator needs to add the Renewal Management fields to the **Product**, **Opportunity**, **Opportunity Product** page Layout before the Users can start using the Renewal Management Application, see the screenshots below for the examples.

- Renewal Management Information section on the **Product** Page Layout

▼ Renewal Management Information	
Add as Line Item to Renewal Opportunity ? ☐	Renew With (The Same Product) ? ☐
Renew With (A Different Product) ?	

- Renewal Management Information section on the **Opportunity** Page Layout

▼ Renewal Management Information	
Run Renewal Management ? ☐	Created From Opportunity ?

- Renewal Management Information section on the **Opportunity Product** Page Layout

▼ Renewal Management Information	
Created From Opportunity ?	Created From Opportunity Close Date ?
Created From Opportunity Product Link ?	

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Step 3: Configure the “Renewal Management” Application

- Go to **Your Name > Setup > App Setup > Deploy > Installed Packages > BoonPlus Renewal Management Free > Configure**
 - Read the inline help  for the definition of each field.
 - See the screenshot below for the example.

SaveCancel

Renewal Management Settings

= Required Information

☒  Enable Renewal Management

Default Term (Months)  12

▼ Asset Settings (only available in Pro and Enterprise Edition)

☐  Create Asset

Asset Status 

▼ Entitlement Settings (only available in Enterprise Edition)

☐  Create Entitlement

☐  Add Asset Contact To Entitlement

▼ Service Contract Settings (only available in Enterprise Edition)

☐  Create/CoTerm Service Contract

Source Of Service 
Contract Owner

▼ Renewal Opportunity Settings (full features available in Pro and Enterprise Edition)

☒  Create/CoTerm Renewal Opportunity

Source Of 
Opportunity Owner

☐  Add Close Date (YYYY-MM-DD) To
Opportunity Name

Opportunity Stage  Prospecting

Opportunity Type 

Days Before 
Entitlement End Date

Opportunity Name 
Prefix

Step 4: Test the Installation

Scenario

A Network Device company provides network solution for enterprises and data centers around the globe. Their solution includes hardware devices (Chassis, Modules, Accessories, etc.) and standard support. Now this company wants to use “BoonPlus Renewal Management Free” to create “Renewal Opportunities” based on the Opportunity Product Line Items in their Opportunities.

- On 6/1/2012, a new customer wants to order 1 x Chassis, 2 x Modules, 4 x Accessories plus 1 year of standard support, what does the Sales/Renewal Rep need to do to generate the Renewal Opportunity?

Solution - Part I (Done by the Administrator)

- Add “Chassis”, “Module” and “Accessory” as new Products
- Add “Standard Support” as a new Product and configure its Renewal Management Settings
 - Follow the screenshot below and create a Product record for “Standard Support”.
 - Since “Standard Support” is a Product for the new orders only, another Product “Standard Support – Renewal” needs to be created and set as the “Renewal With (A Different Product)” in this Product. **(Note: Both products must be added to the same Price Books)**

Product Detail		Edit	Delete	Clone
Product Name	Standard Support	Active	☒	
Product Code	Standard Support	Product Family		
Created By	Paul Liu, 8/11/2012 11:38 PM	Last Modified By	Free Admin, 8/25/2012 7:09 PM	
Product Description				
▼ Renewal Management Information				
Add as Line Item to Renewal Opportunity	☒	Renew With (The Same Product)	☐	
		Renew With (A Different Product)		<u>Standard Support - Renewal</u>
		Edit	Delete	Clone

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Solution - Part II (Done by the Sales/Renewal Rep)

- **Create an Opportunity and configure its Renewal Management settings**
 - The Sales/Renewal Rep should follow the screenshot below and create the opportunity.

Opportunity Detail		Edit	Delete	Clone ▾
Opportunity Owner	Free Admin [Change]	Amount	\$18,000.00	
Private	☐	Expected Revenue	\$1,800.00	
Opportunity Name	6/1/2012 Deal	Close Date	6/1/2012	
Account Name	ABC	Next Step		
Type	New Customer	Stage	Prospecting	
Lead Source		Probability (%)	10%	
		Primary Campaign Source		
Created By	Free Admin, 8/12/2012 8:49 PM	Last Modified By	Free Admin, 8/25/2012 7:16 PM	

- Add products to this opportunity.

Products (Standard Price Book)		Add Product	Edit All	Choose Price Book	Products (Standard Price Book)
		Sort	Help ?		
Action	Product	Quantity	Sales Price	Date	Line Description
Edit Del	Accessory	4.00	\$500.00		
Edit Del	Chassis	1.00	\$10,000.00		
Edit Del	Module	2.00	\$2,000.00		
Edit Del	Standard Support	1.00	\$2,000.00		1 Year Standard Support

- Click on the “Run Renewal Management” checkbox and Save.

Opportunity Detail		Edit	Delete	Clone ▾
Opportunity Owner	Free Admin [Change]	Amount	\$18,000.00	
Private	☐	Expected Revenue	\$1,800.00	
Opportunity Name	6/1/2012 Deal	Close Date	6/1/2012	
Account Name	ABC	Next Step		
Type	New Customer	Stage	Prospecting	
Lead Source		Probability (%)	10%	
		Primary Campaign Source		
Created By	Free Admin, 8/12/2012 8:49 PM	Last Modified By	Free Admin, 8/25/2012 7:21 PM	
Description				
Custom Links	Delivery Status			

▼ Renewal Management Information	
Run Renewal Management ?	☒
Created From Opportunity ?	

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Results

- **New records created by “Renewal Management”**

- 1 x Renewal Opportunity.
- 1 x Renewal Opportunity Product.

Note: Administrator can add the following related lists (Renewal Opportunities & Renewal Opportunity Products) to Sales/Renewal Rep’s Opportunity page layouts.

 **Renewal Opportunities** [New Opportunity](#) [Renewal Opportunities Help ?](#)

Action	Opportunity Name	Account Name	Close Date
Edit Del	2013-06-01 Renewal - 6/1/2012 Deal	ABC	6/1/2013

Renewal Opportunity Products [Renewal Opportunity Products Help ?](#)

Action	Product	Sales Price	Quantity	Date	Line Description
Edit Del	Standard Support - Renewal	\$2,000.00	1.00		1 Year Standard Support

- **Renewal Opportunity**

The Renewal Opportunity Name is “Close Date” + “Renewal - ” + “Created From Opportunity Name”.

Opportunity Detail [Edit](#) [Delete](#) [Clone](#) ▼

Opportunity Owner	 Paul Liu [Change]	Amount	\$2,000.00
Private	☐	Expected Revenue	\$200.00
Opportunity Name	2013-06-01 Renewal - 6/1/2012 Deal		Close Date 6/1/2013
Account Name	ABC		Next Step
Type			Stage Prospecting
Lead Source			Probability (%) 10%
		Primary Campaign Source	
Created By	Free Admin , 8/25/2012 7:24 PM		Last Modified By Free Admin , 8/25/2012 7:24 PM
Description			
Custom Links	Delivery Status		

▼ Renewal Management Information

Run Renewal Management 	Created From Opportunity  6/1/2012 Deal
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▪ “Standard Support - Renewal” Renewal Opportunity Product

Opportunity Product Detail		Edit	Delete
Opportunity	2013-06-01 Renewal - 6/1/2012 Deal		Date
Product	Standard Support - Renewal	Total Price	\$2,000.00
Product Code	Standard Support - Renewal		
List Price	\$0.00		
Sales Price	\$2,000.00		
Quantity	1.00		
Created By	Free Admin , 8/25/2012 7:24 PM	Last Modified By	Free Admin , 8/25/2012 7:24 PM
Line Description	1 Year Standard Support		
▼ Renewal Management Information			
Created From Opportunity ?	6/1/2012 Deal	Created From Opportunity Close Date ?	6/1/2012
Created From Opportunity Product Link ?	https://na9.salesforce.com/00kE00000006EUHeIAO		