



WikiAccount

Introduction

This document provides information about:

1. Basic application setup
2. Optional enhancements

In order to install the WikiAccount Application follow the below 2 steps:

1. Install package from the Appexchange Store.
2. Add a new section in the Account Page Layout in order to display the WikiAccount component

Step 1: Install application from the AppExchange

Install the WikiAccount Package by clicking the "Get It Now" button on the WikiAccount listing on AppExchange.

Simply follow the instructions to install the application.

Please refer to the salesforce.com help files for additional information.

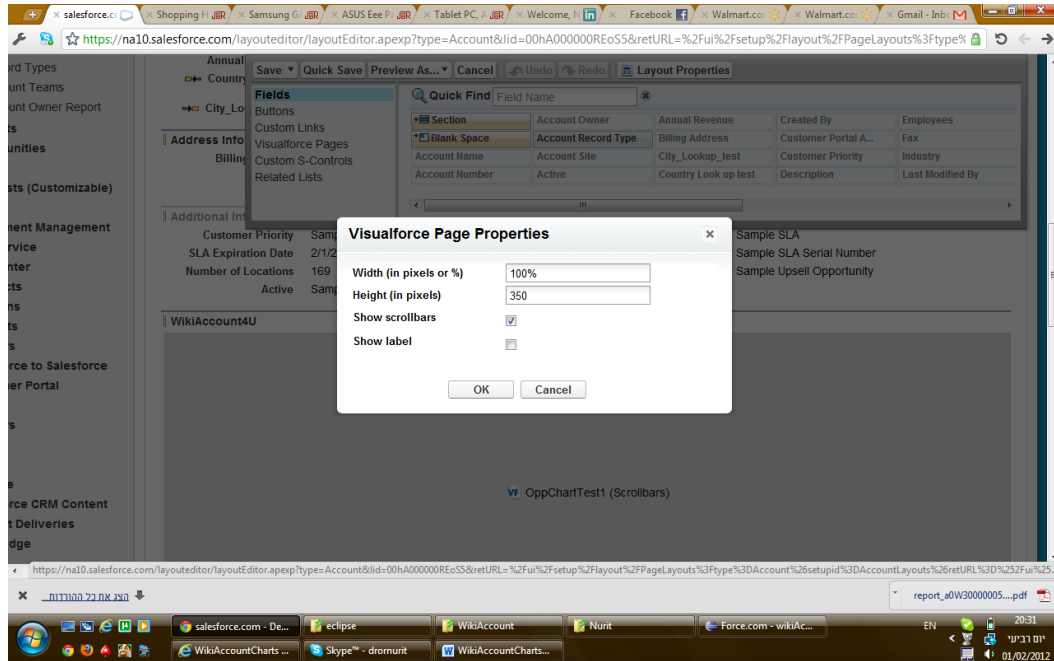
Step 2: Add WikiAccount to account Page Layout.

The WikiAccount package includes a VisualForce page that should be added to the Account page layout.

1. **Go to Setup --> Customize --> Accounts --> Page Layouts**
2. **Click "Edit" next to the layout that should include WikiAccount**
3. **On the upper bar, click on VisualForce Pages**
4. **Drag the vf component to an existing section**
5. **Fill in the size attributes (Width – 100%, Height 250)**
6. **Click "Save" and you are done!**



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FAQ

- Can we change the charts title and the fields wording?**
Yes,
Setup → Create → Custom Labels
All labels with the prefix 'WA' can be modified/ translated.
- Can we translate the charts title and the fields wording?**
Yes,
Setup → Create → Custom Labels
All labels with the prefix 'WA' can be modified/ translated.
- Can we remove a field/ chart or modify its logic?**
Yes,
Each field/ chart coding is managed separately.
With a help of a developer, you can modify the code (*)
- Can we change the security settings?**
Yes,
In the controller, remove the words "With Sharing" and the analytics will be calculated for all opportunities of the account with no relation to the running user view permissions.
With a help of a developer, you can modify the code (*)

(*)Important Note: WikiAccount is a free app distributed on AppExchange. The app and its documentation are not supported by salesforce.com. Every effort was made to ensure this configuration guide is correct, but there may be errors or omissions. Proceed at your own risk!