



OPPORTUNITY MANAGER

A BRAND NEW

 salesforce

APP THAT YOU JUST **CANNOT** MISS!

INSTALLATION GUIDE

VERSION 1.6

APP INSTALLATION GUIDE

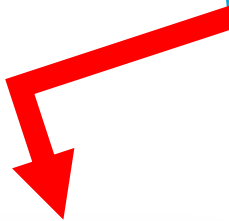


Algoworks

Steps to Install – method 1



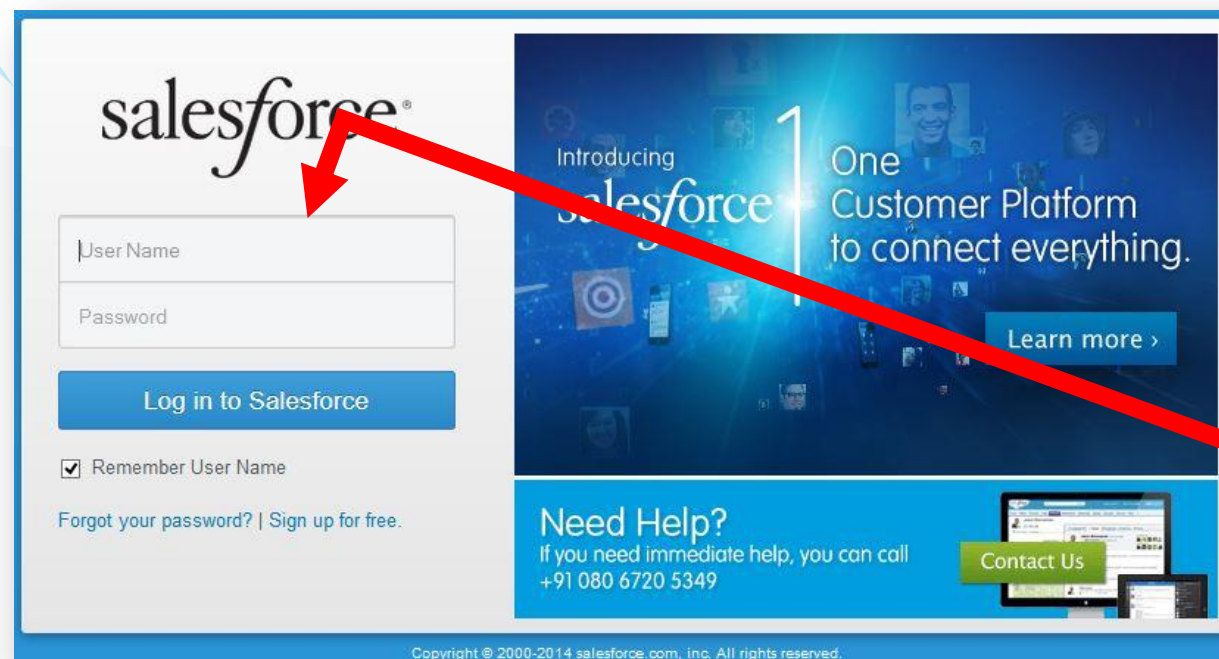
- Connect to internet
- Open a browser of your choice on your machine.
- Browse to “**www.salesforce.com**”
- Click on the LOGIN button mentioned on top-right



Steps to Install - method 1



1. Clicking on LOGIN automatically re-directs to <http://login.salesforce.com>
2. Enter your username and password to login
3. You will land on your home-page.
4. Next, you shall proceed to install the package.



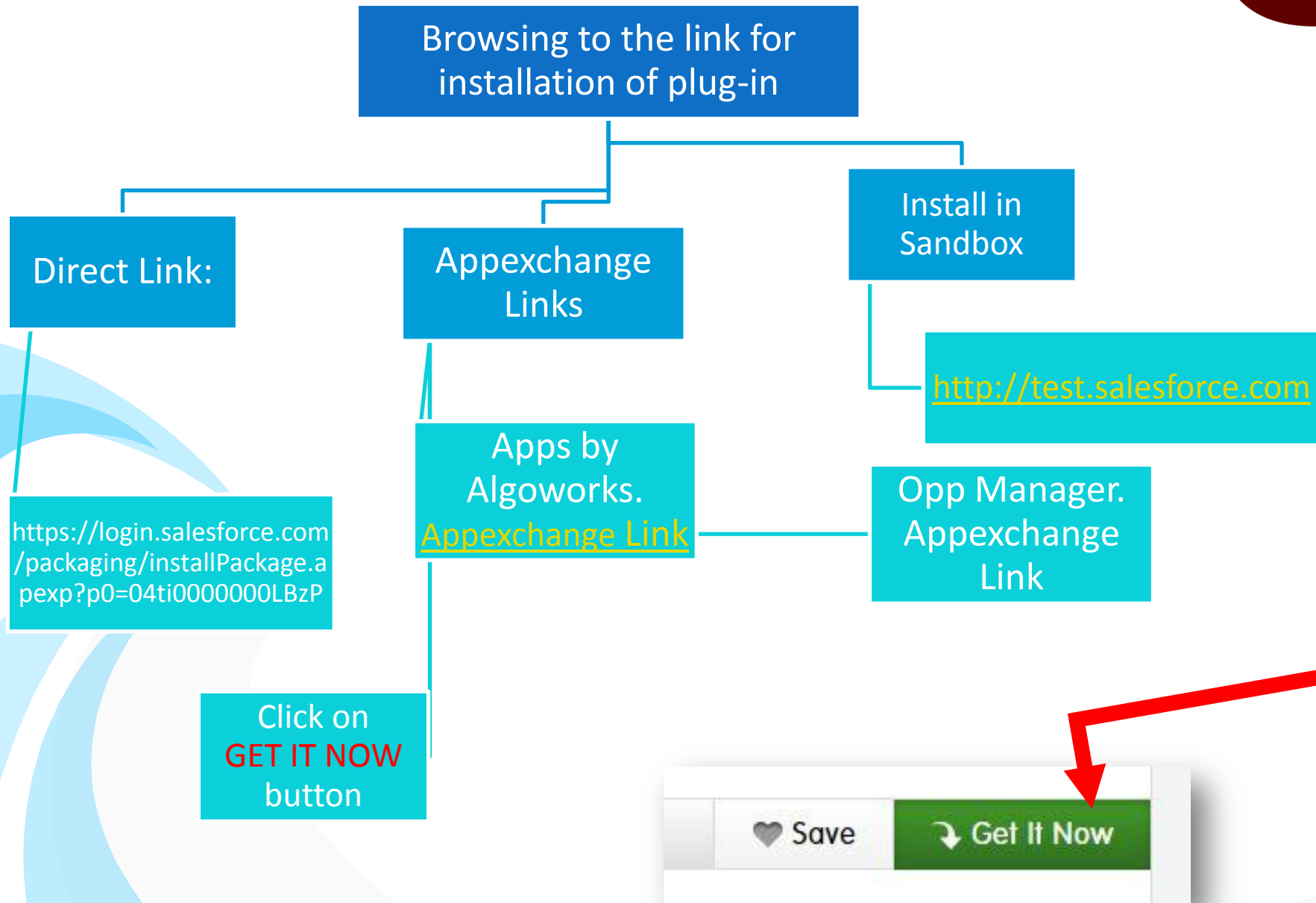
Steps to Install – method 2



Install in sandbox

- Clicking on LOGIN automatically re-directs to <http://test.salesforce.com> for sandbox.
- Directly go to <https://test.salesforce.com/packaging/installPackage.apexp?p0=04ti00000000LBzP> for sandbox.

Steps to Install



Steps to Install



- You will see the package installation details.
- Click on **Continue** button

Search All Setup... ?

Expand All | Collapse All

Salesforce1 Setup **New!**

Force.com Home

Administer

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Administration
- Google Apps
- Data.com Administration

Build

- Customize
- Create
- Develop
 - Schema Builder
 - Canvas App Previewer

Package Installation Details

Help for this Page ?

Package Name	OPPMANAGER
Version Name	Opportunity Manager 4.1
Version Number	4.1
Publisher	algoworks
Description	Now working for Advance Multi Currency as well.

Continue

Cancel

Package Components

▼ Objects (2)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Opportunity Manager Settings		Custom Setting Definition	This is a brand new component.
Create	Opportunity Manager Setting		Custom Object	This is a brand new component.

▼ Tabs (1)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Opportunity Manager		Document Folder	This is a brand new component.

▼ Resources (13)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	ExtJS4		Static Resource	This is a brand new component.
Create	ajaxload		Static Resource	This is a brand new component.
Create	ExportExcel		Static Resource	This is a brand new component.
Create	ext_base		Static Resource	This is a brand new component.

Steps to Install

- It will show you the important component that will be used in the package FYI. Click on the **Next** button



Package Installer
OPPMANAGER

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

	Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓
Assets	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓
Cases	✓	✓	✓	✓
Coaching	✓	✓	✓	✓
Contacts	✓	✓	✓	✓
Contracts	✓	✓	✓	✓
D&B Companies	✓	✓	✓	✓
Documents	✓	✓	✓	✓
Feedback	✓	✓	✓	✓
Feedback Questions	✓	✓	✓	✓
Feedback Question Sets	✓	✓	✓	✓
Feedback Requests	✓	✓	✓	✓
Goals	✓	✓	✓	✓
Goal Collaborators	✓	✓	✓	✓
Goal Links	✓	✓	✓	✓
Ideas	✓	✓	✓	✓
Leads	✓	✓	✓	✓
Opportunities	✓	✓	✓	✓
Orders	✓	✓	✓	✓
Performance Cycles	✓	✓	✓	✓
Price Books	✓	✓	✓	✓
Products	✓	✓	✓	✓
Push Topics	✓	✓	✓	✓
Solutions	✓	✓	✓	✓

General User Permissions
This Package will be able to use all of the general user permissions from the user's profile.

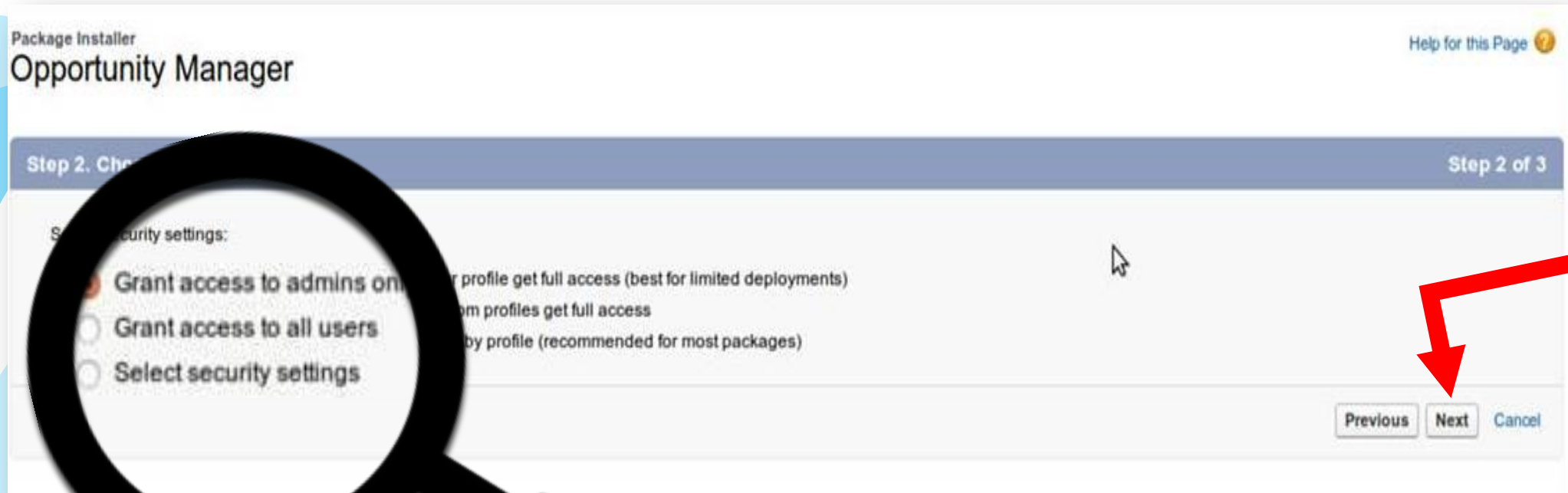
Administrative Permissions
This Package will be able to use all of the administrative privileges from the user's profile.

Next **Cancel**

Steps to Install



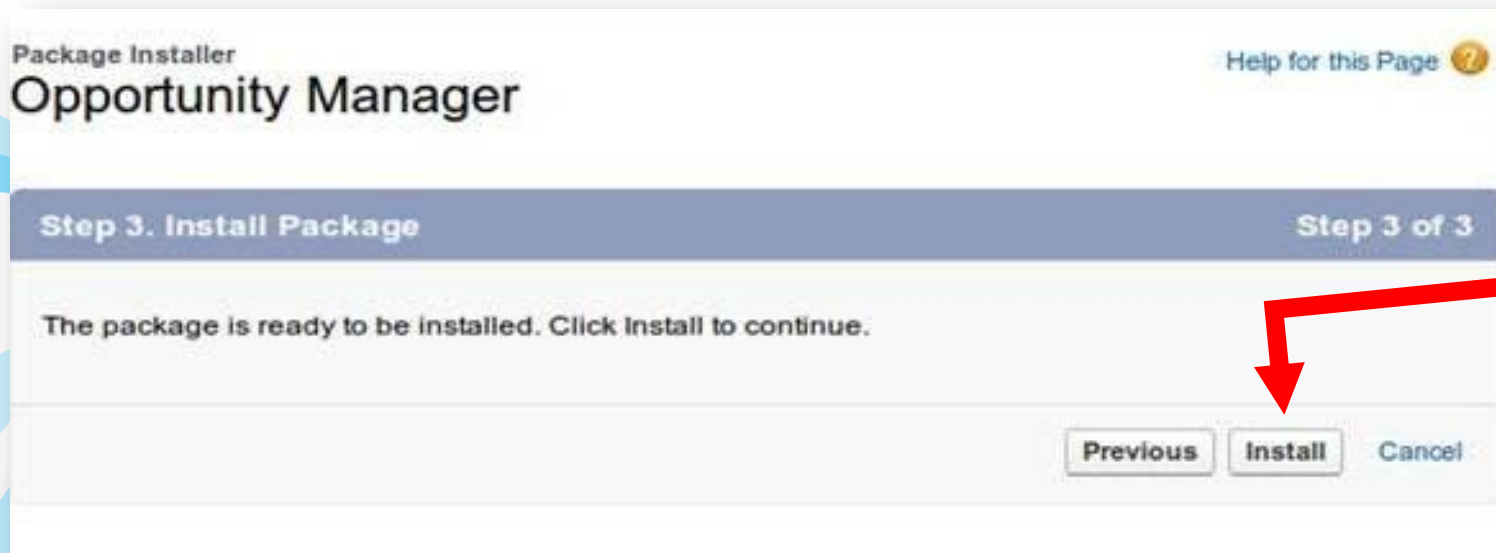
- Now you will see the security level, set default to *admin only*.
- You can change the security level to *all users* or custom.
- Click on the **Next** button



Steps to Install



- This is the final Installation confirmation screen.
- Click on **Install** button



Steps to Install



- Now you will see this screen .
- From **SALES** on the top right corner, select the **Opportunity Manager** app as shown in the image .

The screenshot shows the Salesforce user interface. At the top, the 'Sales' dropdown menu is open, and a red arrow points to the 'Opportunity Manager' option. Below the menu, the 'Package Details' for 'OPPMANAGER (Managed)' are displayed. A green checkmark indicates 'Install Complete'. The 'Installed Package Detail' table shows the following information:

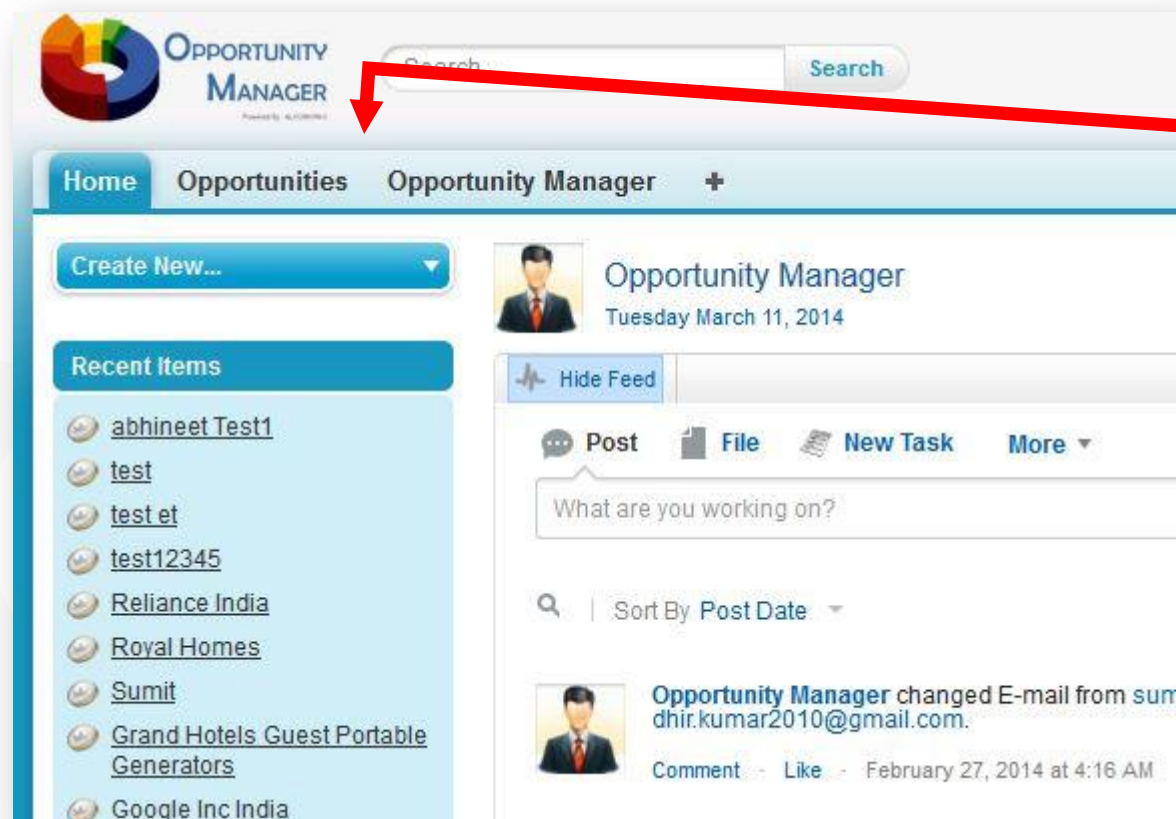
Installed Package Detail	
Package Name	OPPMANAGER
Language	English
Version Name	Opportunity Manager 4.1
Namespace Prefix	OppMan
Publisher	algoworks
Status	Active
Expiration Date	Does not Expire
Description	Opportunity Manager plug-in built for Salesforce platform by Algoworks has been inspired by the demands, likeability and need of the platform users who have been providing us feedback for years.
Installed By	Nauman Ahmad, 10/29/2014 4:27 AM

Steps to Install

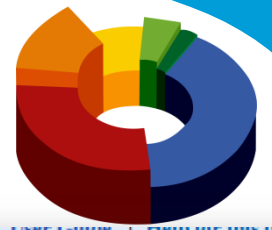


- Click on the **Opportunity Manager** Tab from the top bar...

...to experience something you have never experienced before...



Enjoy AWOM!



User Guide | Help for this page

Opportunities

Stage:
☐ All

Lead Source:
 Opportunity Type:
 Forecast Category:
 Open|Closed:

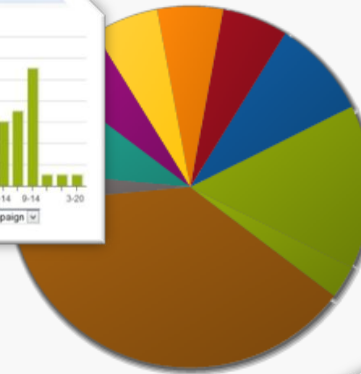
Field-level filtering options are available for each column.
 To access filters, **hover over** the field name and **click on the down arrow**, then select the desired filters.

Double click on the particular Opportunity record to edit it.

To know more about Algoworks, please visit "www.algoworks.com"

For any queries / suggestions, please contact us at "oppmana@algoworks.com"

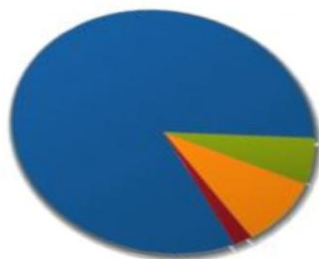
- ☒ Account Name
- ☒ Amount
- ☒ Close Date
- ☒ CreatedBy Name
- ☒ Lead Source



- ☒ Prospecting
- ☐ Qualification
- ☐ Needs Analysis
- ☐ Value Proposition
- ☐ Id. Decision Makers
- ☐ Perception Analysis
- ☐ Proposal/Price Quote
- ☐ Negotiation/Review
- ☐ Closed Won
- ☐ Closed



All
Pie chart



- ☒ None
- ☐ Existing Customer - Upgrade
- ☐ Existing Customer - Replacement
- ☐ New Customer

All
Count
Type

Opportunities			
Add			
Account Name	Amount	Close Date	Lead Source
Edge Commun...			
Grand Hotels...			
Grand Hotels...			
Express Logis...			
Express Logis...			
Express Logis...			
University of Arizona			
University of Arizona	USD 50,000.00	04/15/2012	
University of Arizona	USD 90,000.00	04/15/2012	
United Oil & Gas C...	USD 440,000.00	04/15/2012	
United Oil & Gas C...	USD 270,000.00	04/15/2012	

Name	Owner
2	Nauman Ahmad
	Nauman Ahmad
	Nauman Ahmad
	Nauman Ahmad
ge SLA	Nauman Ahmad
and Hotels Kitch...	Nauman Ahmad
and Hotels SLA	Nauman Ahmad
Express Logistics ...	Nauman Ahmad
Express Logistics ...	Nauman Ahmad
Express Logistics ...	Nauman Ahmad
Express Logistics ...	Nauman Ahmad
University of AZ Ins...	Nauman Ahmad
University of AZ Po...	Nauman Ahmad
University of AZ SLA	Nauman Ahmad
United Oil Emergen...	Nauman Ahmad
United Oil Installations	Nauman Ahmad



Thank You.

Don't waste no time getting it!

For any queries regarding installation,
please send a mail to oppmanager@algoworks.com.



LIMITED TIME OFFER!

OPPORTUNITY MANAGER APP

AN  Algoworks PRODUCT

www.algoworks.com/salesforce