

Marketing / Campaign Calendar Install Instructions

Start at the AppExchange:

<http://appexchange.salesforce.com/listingDetail?listingId=a0N30000003Io4WEAS>

The screenshot shows the Salesforce AppExchange interface for the 'Marketing Calendar Free' app. The top navigation bar includes 'Home', 'Apps', 'Services', and 'Publishing'. A search bar is on the left, and a 'Login or Register' button is on the right. The app listing is for 'Marketing Calendar Free' by Cambridge Cloud Partners, Inc., dated 11/4/2010. It has a 4.8 out of 5 star rating from 6 reviews. The app is categorized under 'High Tech, Nonprofits, Marketing, Tools > Productivity Tools, Analytics'. The 'Highlights' section states: 'View your campaigns in a calendar format'. The 'Pricing' section indicates it is 'Free' and asks users to 'Please contact us for more information.' with links for 'Website' and 'Email'. The 'Description' section explains that the app allows users to view campaigns in a calendar format, filter, print, and color-code entries. A 'Get It Now' button is prominently displayed. On the right, there are links to 'View Screenshots' and 'More Apps' from Cambridge Cloud Partners, Inc., including links for 'iPhone Web App and Android App for Salesforce'.

Home Apps Services Publishing MY SAVED LIST Login or Register

Search

Categories: High Tech, Nonprofits, Marketing, Tools > Productivity Tools, Analytics

Marketing Calendar Free

App by Cambridge Cloud Partners, Inc. 11/4/2010

4.8 out of 5 (6 reviews)

Free No Support Add To Saved

Get It Now

Overview Spec Support Provider

Highlights

- View your campaigns in a calendar format

Pricing

- Free

Please contact us for more information.

- Website
- Email

Description

This simple tab allows you to view your campaigns in a calendar format that is easy to understand. Give your salespeople a view of your marketing activity so they know when the next trade show, email blast, or webinar takes place. Color-code your campaigns based on health, priority, or any custom criteria.

This is our first release - we are working on a paid version that will allow users to filter, print, and other great things with campaigns. Let us know if you would like to hear more about that version when it is released.

View Screenshots

Also from Cambridge Cloud Partners, Inc.

iPhone Web App and Android App for Salesforce

More Apps »

Click "Get It Now"

salesforce

SOFTWARE

User Name

test@test.com

Password

.....

☒ Remember User Name

Login

Forgot your password?

Don't have an account? [Sign up for free.](#)

force.com

appexchange

Please login with your Salesforce

[Need help with Login?](#)

“Tapping the knowledge of the Sales community and exchanging ideas with r one of the biggest benefits of the AppE

—Michele McMahon, Director, Ariba

OverviewReviewsSpecSupportPublisher

4.7

out of 5

★★★★★

Ease of Use

★★★★★

Value

★★★★★

Support

★★★★★

Share your experience with this app.

(Based on 26 reviews)

Security Alerts, Best Practices, and System Status

To review security alerts, learn more about protecting your Salesforce CRM information and access, and review system status, visit: [trust.salesforce.com](#)
[Learn More](#)

New Users:

Please retrieve your user name and temporary password email account or contact your organization's Salesforce administrator for further instructions.
<https://trust.salesforce.com/>

Login to salesforce.com

appexchange2
the cloud computing marketplace

Date

Home

Apps

Services

Publishing

Confirm Installation

Marketing Calendar Free
App by Cambridge Cloud Partners, Inc.

Installation Instructions

Thank you for your interest in installing Marketing Calendar Free. Please take the following steps to inst

1. Review the application and subscription information to understand what you are installing.

2. Review the organization and user information to ensure that you are installing this application in

3. Read and agree to the terms & conditions.

4. Click the Install button to start the installation process.

What You Are Installing

Package:

Version:

Subscription:

Duration:

Number of
Subscribers:

Marketing Calendar Free

Marketing Calendar Free (November 2010 /
1.3.0)

Free

Does Not Expire

Site-wide

Organization:

Edition:

User Name:

Can

Dev

dat

(Log

☒ I have read and agree to the [terms & conditio](#)

Cancel

Install

1-800-NO-SOFTWARE | Home | Privacy Statement | Terms of Use | Choose Your Language

Accept the terms and conditions and click the “Install” button

Package Installation Details

Package Name	Marketing Calendar Free
Version Name	November 2010
Version Number	1.3
Publisher	Cambridge Cloud Partners, Inc.
Description	

Continue Cancel

Package Components

▼ Code (1)

Action	Component Name	Parent Object	Component Type
Create	CampaignCalendar		Apex Class

▼ Resources (1)

Action	Component Name	Parent Object	Component Type
Create	FullCalendar		Static Resource

▼ Pages (1)

Action	Component Name	Parent Object	Component Type
Create	CampaignCalendar		Visualforce Page

▼ Fields (1)

Action	Component Name	Parent Object	Component Type
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Click “Continue”

LeadsAccountsContactsOpportunitiesForecastsContractsCasesSolutionsProductsReportsDocumentsDashboards

Package InstallerMarketing Calendar Free

Help for this Page

Step 1. Approve Package API AccessStep 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		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Ideas	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Products	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Solutions	✓	✓	✓	✓
Documents	✓	✓	✓	✓					

General User Permissions

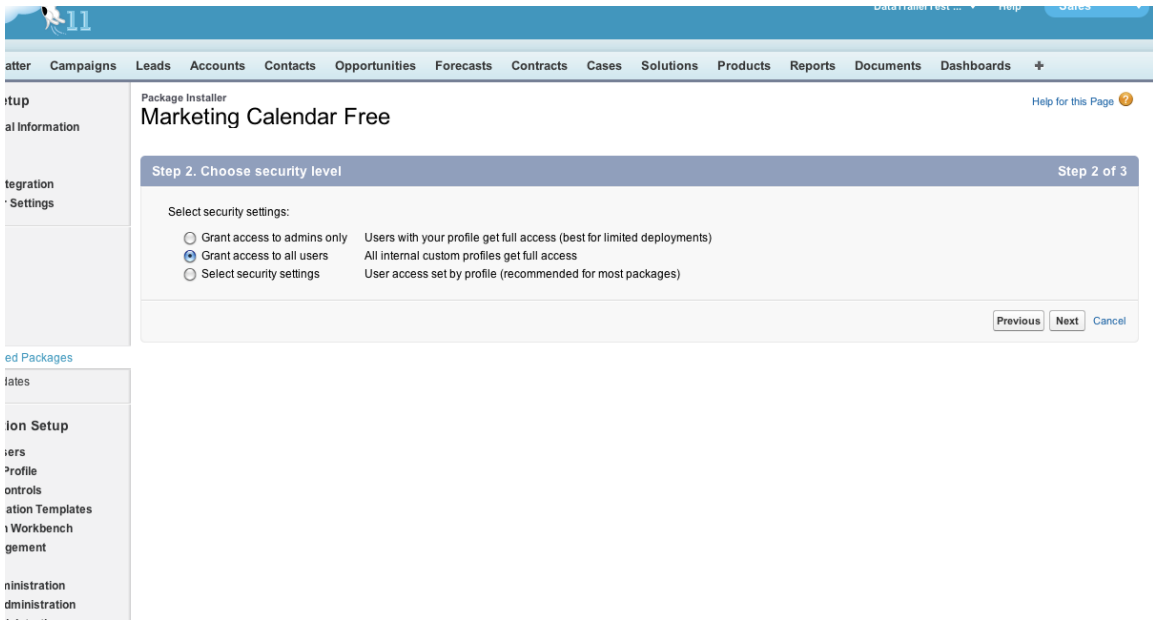
This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions

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

NextCancel

Click “Next”



Select “grant access to all users” and click “Next”

Signs

Leads

Accounts

Contacts

Opportunities

Forecasts

Contracts

Cases

Solutions

Products

Reports

Documents

Dashboards

+

Package Installer

Marketing Calendar Free

Help for this Page

Step 3. Install Package

Step 3 of 3

The package is ready to be installed. Click Install to continue.

☐ Ignore Apex test failures that may cause the installed application not to function properly.

Previous

Install

Cancel

Click “Install”

Home Chatter Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Cases Solutions

Personal Setup

- ▶ My Personal Information
- ▶ Email
- ▶ Import
- ▶ Desktop Integration
- ▶ My Chatter Settings

App Setup

- ▼ Customize
 - ▶ Tab Names and Labels
 - ▶ Home
 - ▶ Activities
 - ▼ Campaigns
 - Fields
 - Validation Rules
 - Triggers
 - Page Layouts
 - Field Sets **New!**
 - Search Layouts
 - Buttons and Links

Campaign Page Layout

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

Campaign Page Layouts

NewPage Layout Assignment

Action	Page Layout Name	Created By
Edit Del	Campaign Layout	DataTrailerTest DataTrailerTest , 2/7/2011 10:58 AM

To change the color of a campaign on the calendar you must use the “Color Status” field.

In setup, navigate to Customize > Campaigns > Page Layouts

Click “Edit” next to the page layout name you wish to add the field

Leads
Accounts
Contacts
Opportunities
Forecasts
Contracts
Cases
Solutions
Products
Reports
Documents
Dashbo

Campaign Layout
Mini Page Layout
Mini Console View
Video Tutoria

Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties

Fields
Buttons
Custom Links
Related Lists

Quick Find
Field Name

Blank Space
Section

Budgeted Cost	Color Status	End Date	Num Sent	Start Date
Campaign Member Type	Converted Leads	Expected Response...	Num Total Opportu...	Status
Active	Campaign Name	Created By	Expected Revenue	Num Won Opportuni...
Actual Cost	Campaign Owner	Description	Last Modified By	Parent Campaign
				Total Actual Cost...
				Total Budgeted Co...

Campaign Sample

Highlights Panel

Customize the highlights panel for this page layout...

Campaign Detail

Edit
Delete
Clone
Sharing
Manage Members
Advanced Setup

Standard Buttons
Custom Buttons

Campaign Information (Header visible on edit only)

Campaign Owner
Sample User

Campaign Name
Sample Campaign Name

Active
☒

Type
Sample Type

Status
Sample Status

Start Date
2/7/2011

End Date
2/7/2011

Expected Revenue
\$123.45

Budgeted Cost
\$123.45

Actual Cost
\$123.45

Expected Response (%)
480.96%

Num Sent
51,867

Total Leads
20,851

Converted Leads
85,681

Total Contacts
82,705

Total Responses
23,001

Num Total Opportunities
93,040

Num Won Opportunities
90,645

Total Value Opportunities
\$123.45

Total Value Won Opportunities
\$123.45

Color Status
Sample Color Status

Drag the “Color Status” field from the field tray on the top into the page layout below and press the “Save” button

Campaign Edit

DM Campaign to Top Customers - Nov 12-23, 2001

Campaign Edit

Save

Save & New

Cancel

Campaign Information

Campaign Owner

DataTrailerTest DataTrailerTest

Campaign Name

DM Campaign to Top

Active

☒

Type

Direct Mail

Status

Completed

Start Date

5/27/2004 [2/7/2011]

End Date

6/7/2004 [2/7/2011]

Expected Revenue

2,500,000

Budgeted Cost

25,000

Actual Cost

23,500

Expected Response (%)

7.00

Color Status

✓ --None--

Green

Yellow

Red

Hide

Open a campaign record to validate that you can now change the color or your campaigns



Marketing Calendar

July 2004

today ◀ ▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

GC Product Webinar -
Jan 7, 2002

Select the “All Tabs” tab (last tab, looks like an arrow) and select “Marketing Calendar”