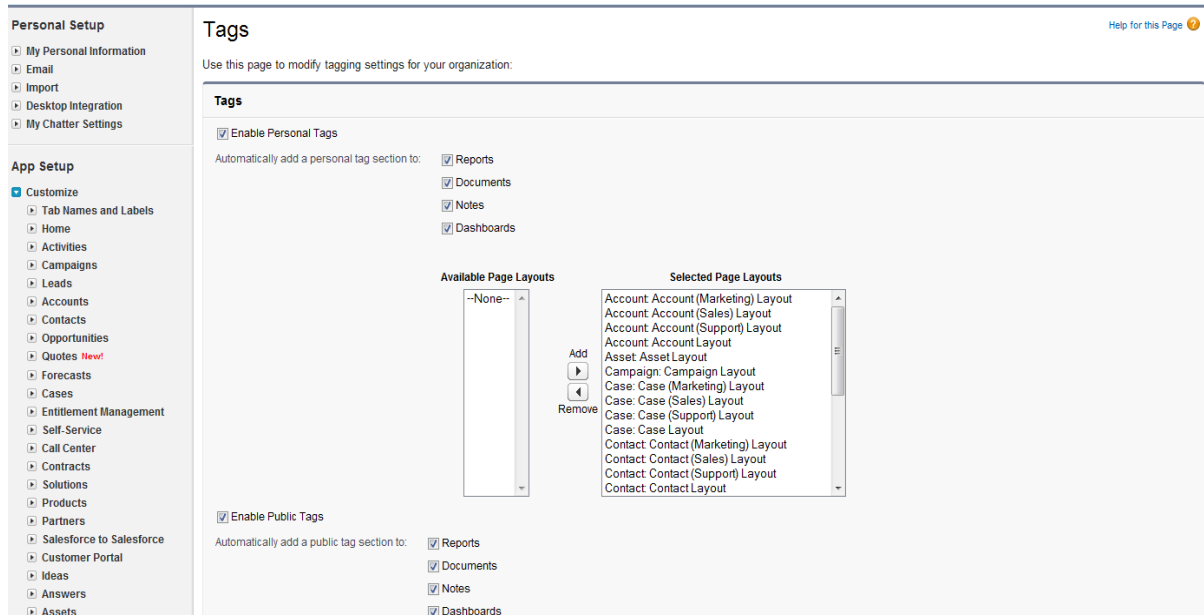


KCS Coaching and Assessment Installation Guide

Pre-Deployment Steps

Configuration

1. Enable Public and Personal Tags.
 - a. Go to **Setup > App Setup > Customize > Tags** to enable both public and personal Tags.



Personal Setup

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

App Setup

- Customize
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts
 - Contacts
 - Opportunities
 - Quotes *New!*
 - Forecasts
 - Cases
 - Entitlement Management
 - Self-Service
 - Call Center
 - Contracts
 - Solutions
 - Products
 - Partners
 - Salesforce to Salesforce
 - Customer Portal
 - Ideas
 - Answers
 - Assets

Tags [Help for this Page](#)

Use this page to modify tagging settings for your organization:

Tags

☒ Enable Personal Tags

Automatically add a personal tag section to:

- ☒ Reports
- ☒ Documents
- ☒ Notes
- ☒ Dashboards

Available Page Layouts

--None--

Selected Page Layouts

- Account Account (Marketing) Layout
- Account Account (Sales) Layout
- Account Account (Support) Layout
- Account Account Layout
- Asset Asset Layout
- Campaign Campaign Layout
- Case Case (Marketing) Layout
- Case Case (Sales) Layout
- Case Case (Support) Layout
- Case Case Layout
- Contact Contact (Marketing) Layout
- Contact Contact (Sales) Layout
- Contact Contact (Support) Layout
- Contact Contact Layout

☒ Enable Public Tags

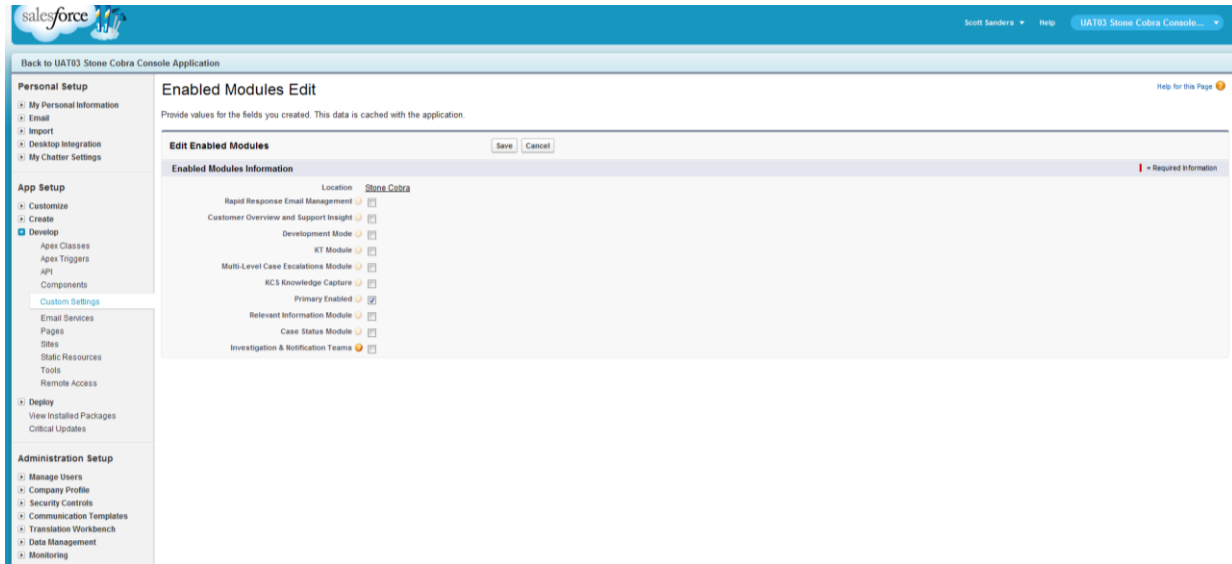
Automatically add a public tag section to:

- ☒ Reports
- ☒ Documents
- ☒ Notes
- ☒ Dashboards

Post-Deployment Steps

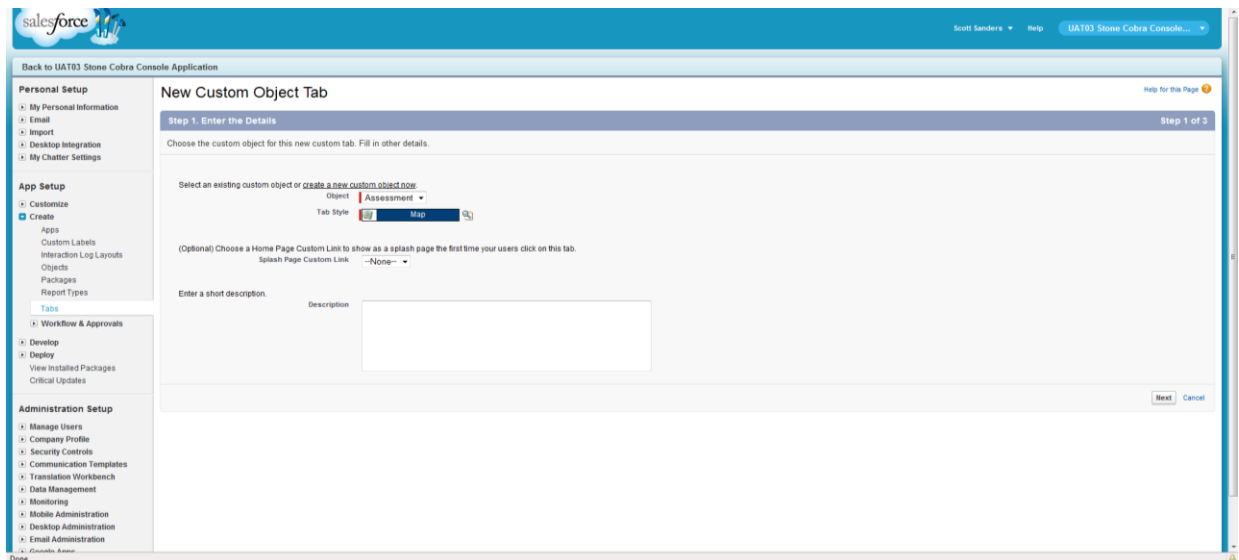
Configuration

1. Enable Modules
 - a. Go to **Setup > App Setup > Develop > Custom Settings**
 - b. Click the Manage link next to Enabled Modules
 - c. Click New above Default Organization Level Value
 - d. Check the Primary Enabled checkbox
 - e. Click the Save button

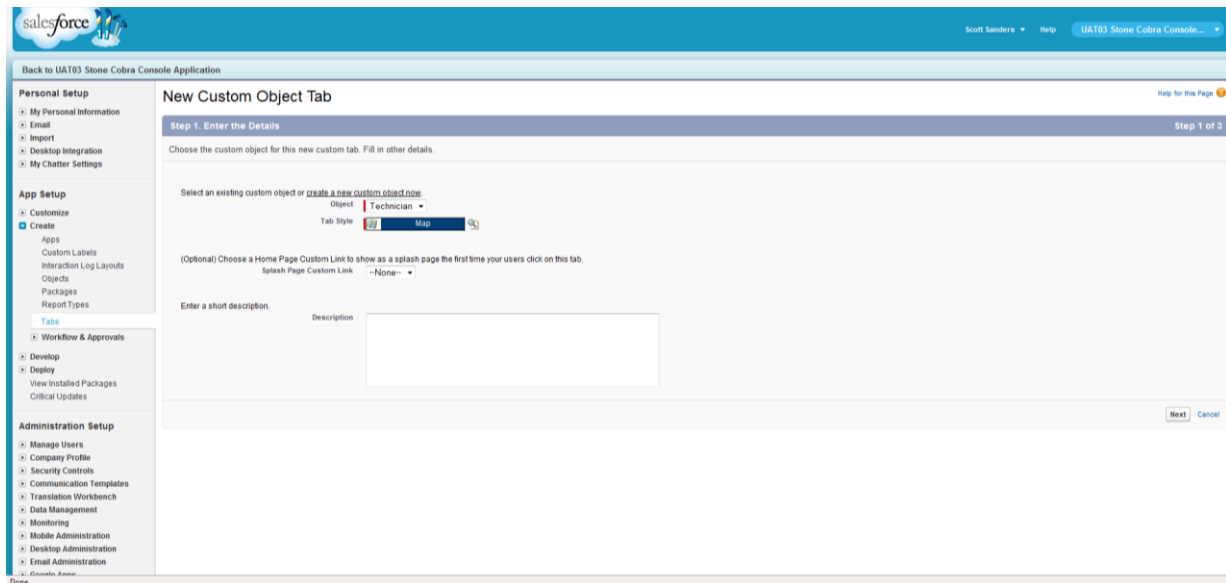


The screenshot displays the 'Enabled Modules Edit' page in the Salesforce console. The left sidebar contains navigation links for 'Personal Setup', 'App Setup', and 'Administration Setup'. The 'App Setup' section is expanded, showing 'Custom Settings'. The main content area is titled 'Enabled Modules Edit' and includes a 'Save' button. Below this, there is a table of modules with checkboxes for enabling them. The 'Primary Enabled' checkbox for the 'Investigation & Notification Teams' module is checked. The page also includes a top navigation bar with the Salesforce logo and user information.

2. Create the Custom Object Tabs needed for the Console App
 - a. Go to **Setup > App Setup > Create > Tabs**
 - b. Click New next to Custom Object Tabs
 - c. Choose Assessment from the Object dropdown
 - d. Choose the Tab style you want
 - e. Click Next



- f. Set the appropriate visibility for each of the Profiles
- g. Click Next
- h. Choose the Applications that should have access to the Assessment Tab.
Note: the Assessment Tab must be included in the Console Application
- i. Click Save
- j. Click New next to Custom Object Tabs
- k. Choose Technician from the Object dropdown
- l. Choose the Tab style you want
- m. Click Next



Back to UA103 Stone Cobra Console Application

Personal Setup

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

App Setup

- Create
 - Apps
 - Custom Labels
 - Interaction Log Layouts
 - Objects
 - Packages
 - Report Types
 - Tabs
- Workflow & Approvals
- Develop
- Deploy
- View Installed Packages
- Critical Updates

Administration Setup

- Manage Users
- Company Profile
- Security Controls
- Communication Templates
- Translation Workbench
- Data Management
- Monitoring
- Mobile Administration
- Desktop Administration
- Email Administration
- Knowledge Base

New Custom Object Tab

Step 1: Enter the Details Help for this Page Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object: Technician

Tab Style: Map

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

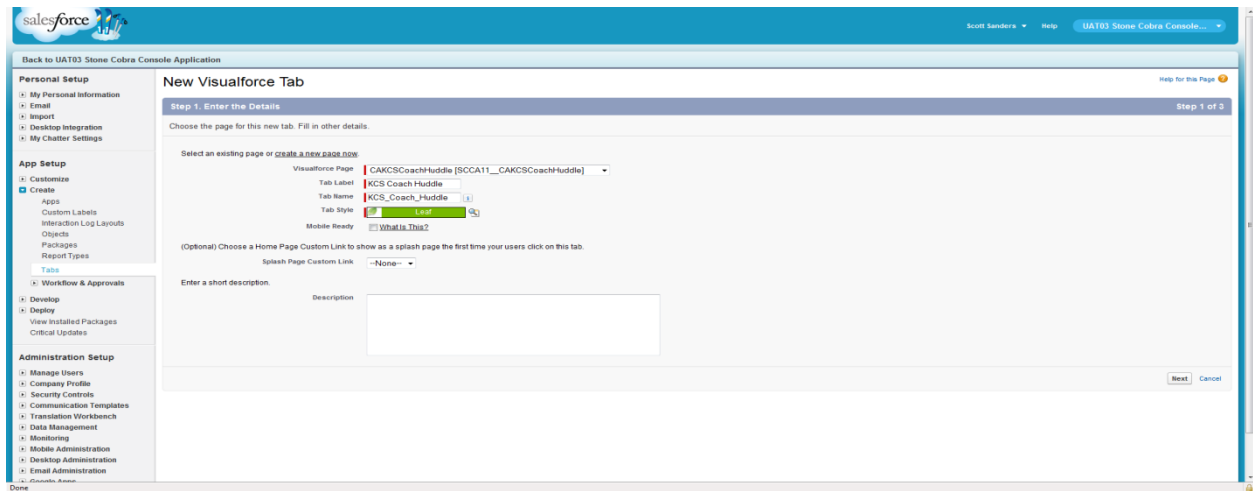
Splash Page Custom Link: None

Enter a short description.

Description:

Next Cancel

- n. Set the appropriate visibility for each of the Profiles
 - o. Click Next
 - p. Choose the Applications that should have access to the Technician Tab.
Note: the Technician Tab must be included in the Console Application
 - q. Click Save
3. Create the Visualforce Tabs for CAKCSCoachHuddle and CAKCS TechProfile needed for the Console App
 - a. Go to **Setup > App Setup > Create > Tabs**
 - b. Click New next to Visualforce Tabs
 - c. Choose CAKCSCoachHuddle from the Visualforce Page dropdown
 - d. Enter KCS Coach Huddle for the Tab label
 - e. Accept the default Tab name
 - f. Choose the Tab style you want
 - g. Click Next



Back to UAT03 Stone Cobra Console Application

Personal Setup

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

App Setup

- Create
 - Custom Labels
 - Interaction Log Layouts
 - Objects
 - Packages
 - Report Types
 - Visualforce Pages
 - Visualforce Tabs
- Workflow & Approvals
- Develop
- Deploy
- View Installed Packages
- Critical Updates

Administration Setup

- Manage Users
- Company Profile
- Security Controls
- Communication Templates
- Translation Workbench
- Data Management
- Monitoring
- Mobile Administration
- Desktop Administration
- Email Administration

Done

New Visualforce Tab

Step 1: Enter the Details

Choose the page for this new tab. Fill in other details.

Select an existing page or [create a new page now](#).

Visualforce Page: CAKCSCoachHuddle [SCA11__CAKCSCoachHuddle]

Tab Label: KCS Coach Huddle

Tab Name: KCS_Coach_Huddle (1)

Tab Style: Leaf

Mobile Ready: ☐ What is this?

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

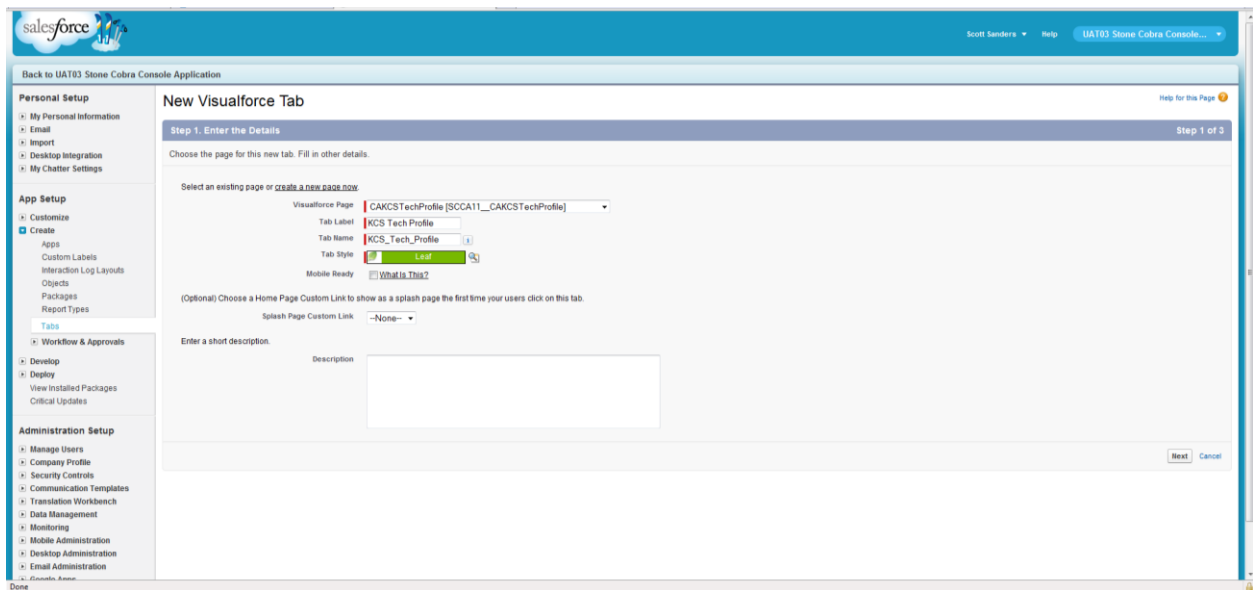
Splash Page Custom Link: --None--

Enter a short description.

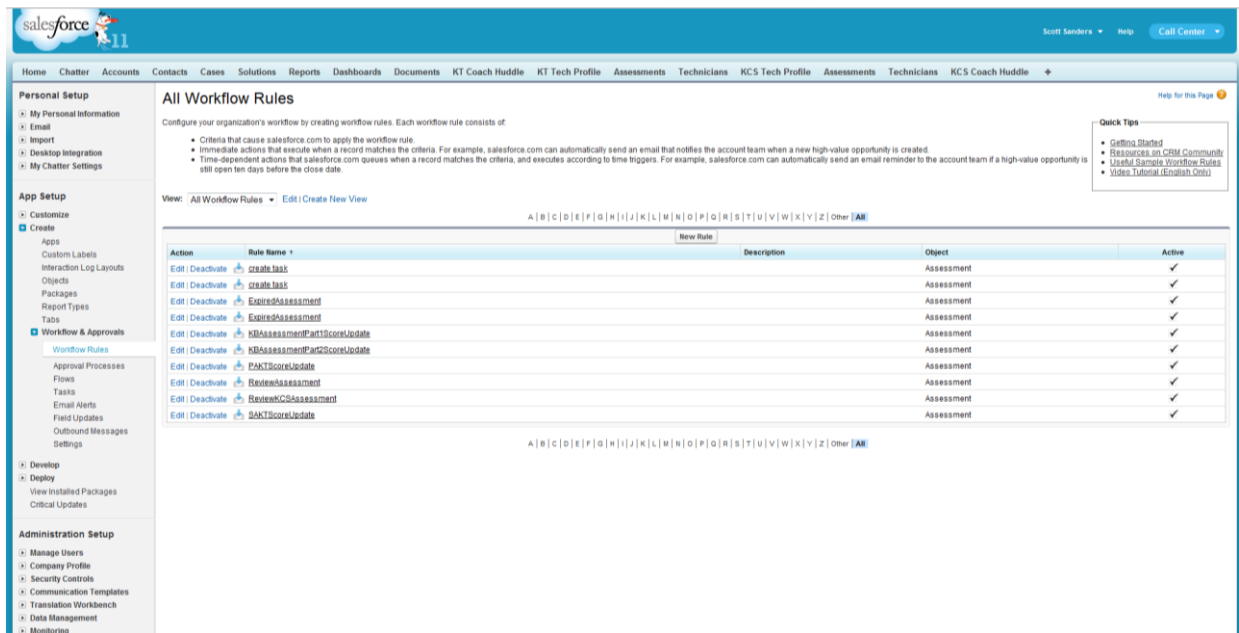
Description:

Next Cancel

- Set the appropriate visibility for each of the Profiles
- Click Next
- Choose the Applications that should have access to the KCS Coach Huddle Tab. Note: the KCS Coach Huddle Tab must be included in the Console Application
- Click Save
- Click New next to Visualforce Tabs
- Choose CAKCS Tech Profile from the Visualforce Page dropdown
- Enter KCS Tech Profile for the Tab label
- Accept the default Tab name
- Choose the Tab style you want
- Click Next

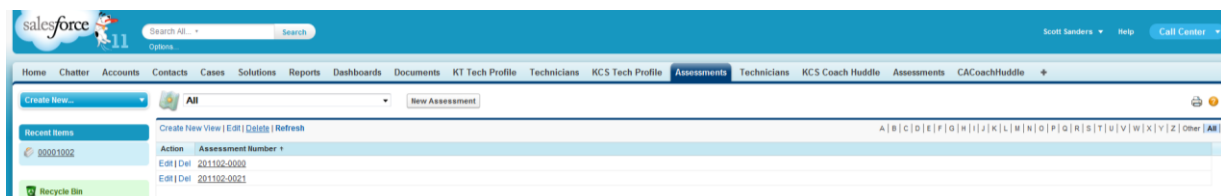


- r. Set the appropriate visibility for each of the Profiles
 - s. Click Next
 - t. Choose the Applications that should have access to the CAKCS_Tech_Profile Tab. Note: the CAKCS_Tech_Profile Tab must be included in the Console Application
 - u. Click Save
4. Make sure all the workflow related to the assessment object are active (**Setup > App Setup > Create > Workflow & Approvals > Workflow Rules**).
 - a. Verify the following rules are active:
 1. Create task
 2. ExpiredAssessment
 3. KBAssessmentPart1ScoreUpdate
 4. KBAssessmentPart2ScoreUpdate
 5. ReviewKCSAssessment



The screenshot shows the Salesforce 11 interface for the 'All Workflow Rules' page. The left sidebar contains navigation menus for Personal Setup, App Setup, and Administration Setup. The main content area displays a list of workflow rules with columns for Action, Rule Name, Description, Object, and Active status. A 'Quick Tip' box is visible on the right side of the page.

5. Remove the all list view filter from the assessment and the technician list view, go to the Assessments and Technicians page, select the list view filter edit it and click on the delete button.
 - a. Select Call Center from the Application drop down
 - b. Click on the Assessments tab
 - c. Choose the All list view from the dropdown list
 - d. Click Delete and confirm
 - e. Click on the Technicians tab
 - f. Choose the All list view
 - g. Click Delete and confirm

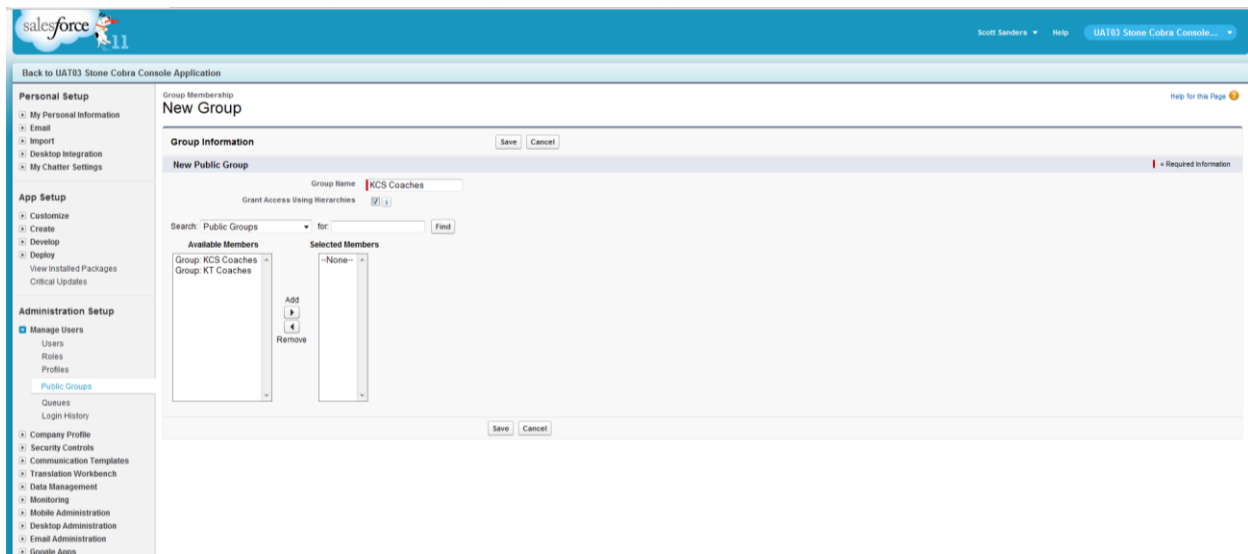


The screenshot shows the Salesforce 11 interface for the 'Assessments' page. The left sidebar contains navigation menus for Personal Setup, App Setup, and Administration Setup. The main content area displays a list of assessments with columns for Action, Assessment Number, and a date field. A 'Create New' button is visible at the top left of the main content area.

6. Sharing rules between coaches:

a. Create a public group called 'KCS Coaches'(**Setup>Administration Setup > Manage Users > Public Groups**).

1. Click New
2. Enter KCS Coaches as the Group Name
3. Click Grant Access Using Hierarchies
4. Search Public Groups from dropdown
5. Click Find
6. Click Add to add your Group to Selected Members
7. Click Save



b. Add a sharing rule for the assessment object:

1. **Setup>Administration Setup > Security Controls > Sharing Setting**
2. Click New next to the Assessment Sharing Rules
3. Set the Assessment: owned by members of to KCS Coaches
4. Set Share with to KCS Coaches
5. Set Access Level to Read/Write.
6. Click Save
7. Confirm that the operation could take significant time