



Selling to Zebras



Salesforce App Exchange: Zebra Scoring and Qualification Tool

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1. Installation:

Install by downloading the managed package: SellZebra

Package Components:

Action	Name	Parent Object	Type
	<u>SellingToZebra</u>		App
	<u>ZebraScore</u>		Visualforce Page
	All	Zebra Score	List View
	<u>ROI Comments</u>	Zebra Score	Custom Field
	<u>ROI Date</u>	Zebra Score	Custom Field
	<u>ROI Score</u>	Zebra Score	Custom Field
	<u>Service Comments</u>	Zebra Score	Custom Field
	<u>Operations Comments</u>	Zebra Score	Custom Field
	<u>Operations Date</u>	Zebra Score	Custom Field
	<u>Operations Score</u>	Zebra Score	Custom Field
	<u>ZebraScoreController</u>		Apex Class
	<u>Funding Comments</u>	Zebra Score	Custom Field
	<u>TestZebraScoreController</u>		Apex Class
	<u>Funding Date</u>	Zebra Score	Custom Field
	<u>Funding Score</u>	Zebra Score	Custom Field
	<u>Total Score</u>	Zebra Score	Custom Field
	<u>Technology Score</u>	Zebra Score	Custom Field
	<u>setZebraColor</u>	Opportunity	Apex Trigger
	<u>ZRM Dashboard</u>		Dashboard
	<u>Service Score</u>	Zebra Score	Custom Field
	<u>CalculateTotalScore</u>	Zebra Score	Apex Trigger
	<u>Service Date</u>	Zebra Score	Custom Field
	<u>Technology Date</u>	Zebra Score	Custom Field
	<u>Technology Comments</u>	Zebra Score	Custom Field
	<u>Opportunity</u>	Zebra Score	Custom Field

<u>Total Zebra Score</u>	Opportunity	Custom Field
<u>Numbered Zebra Color</u>	Opportunity	Custom Field
<u>Zebra Color</u>	Opportunity	Custom Field
<u>Label on score 0</u>	Zebra Label and Tooltip	Custom Field
<u>BZAZReport</u>		Report
<u>Label on score 4</u>	Zebra Label and Tooltip	Custom Field
<u>Tooltip on score 0</u>	Zebra Label and Tooltip	Custom Field
<u>Zebra Layout</u>	Opportunity	Page Layout
<u>Tooltip on score 4</u>	Zebra Label and Tooltip	Custom Field
<u>zebra_logo</u>		Static Resource
<u>Access to Power Comments</u>	Zebra Score	Custom Field
<u>Access to Power Date</u>	Zebra Score	Custom Field
<u>Access to Power Score</u>	Zebra Score	Custom Field
<u>Company Profile Comments</u>	Zebra Score	Custom Field
<u>Company Profile Date</u>	Zebra Score	Custom Field
<u>Zebra Label and Tooltip Layout</u>	Zebra Label and Tooltip	Page Layout
<u>Organization Score</u>	Zebra Score	Custom Field
<u>Zebra Score Layout</u>	Zebra Score	Page Layout
<u>ZebraScore</u>	Opportunity	Button or Link
<u>ZAAS Opportunity Reports</u>		Report Folder
<u>Company Dashboards</u>		Dashboard Folder
<u>ZebraScore</u>	Opportunity	Action
<u>Zebra Score</u>		Custom Object
<u>Zebra Label and Tooltip</u>		Custom Object
<u>info_icon</u>		Static Resource
<u>ZebraSellingLogo</u>		Static Resource

2. User Profiles

Select the user profiles who will have access to the Zebra Scoring and Qualification Tool objects. Review contract for terms about per user pricing. User Profiles can also be changed after implementation

Select **Setup**

App Setup > Create > Apps

Edit the Installed Package SellZebra

Apps				
Quick StartNewReorde				
Action	App Label	Installed Package	Console	Custom
Edit	App Launcher		☐	☐
Edit	Call Center		☐	☐
Edit	Community		☐	☐
Edit	Content		☐	☐
Edit	Marketing		☐	☐
Edit	Platform		☐	☐
Edit	Sales		☐	☐
Edit	Salesforce Chatter		☐	☐
Edit	Sample Console		☒	☐
Edit	Site.com		☐	☐
Edit Del	Zebra Scoring and Qualification Tool	SellZebra	☐	☒

You will be given the following screen where you can customize, the app label, tabs and user profiles

App

Zebra Scoring and Qualification Tool (Managed)

 This Custom App is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Custom App Edit

SaveSave & NewCancel

App LabelZebra Scoring and Qualification Tool

App NameSellingToZebra*i*

Namespace PrefixZebraSelling

Installed PackageSellZebra

Description

Choose the Image Source for the Custom App Logo

Insert an ImageReset to Default



Choose the Tabs

Available Tabs

Subscriptions
Ideas
Profile
People
Groups
Files
Chatter
Data.com
Site.com
D&B Companies
Profile Feed
Profile Overview
App Launcher
Macros

AddRemove

Selected Tabs

Home
Accounts
Opportunities
Reports
Dashboards

UpDown

Overwrite Users' Personal Custom App Customizations

☐

Default Landing Tab

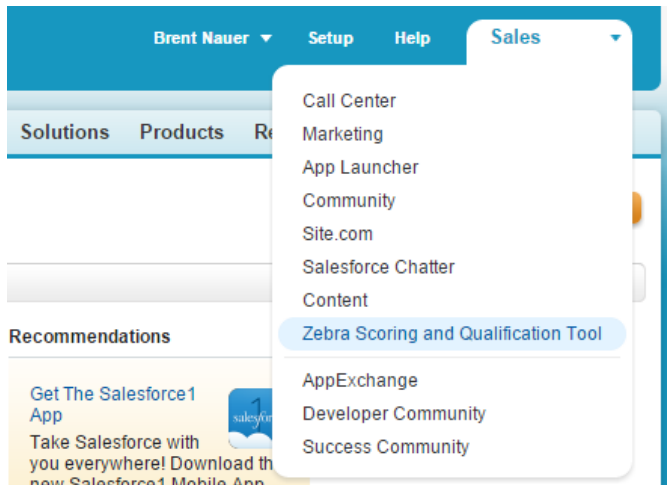
Home*i*

Scrolling down you will have the ability to assign the managed package objects to the available Profiles:

Assign to Profiles	Profile	☐ Visible	☐ Default
	Authenticated Website	☐	☐
	Contract Manager	☐	☐
	Cross Org Data Proxy User	☐	☐
	Custom: Marketing Profile	☒	☐
	Custom: Sales Profile	☒	☐
	Custom: Support Profile	☐	☐
	Customer Community Login User	☐	☐
	Customer Community Plus Login User	☐	☐
	Customer Community Plus User	☐	☐
	Customer Community User	☐	☐
	Customer Portal Manager Custom	☐	☐
	Customer Portal Manager Standard	☐	☐
	External Identity User	☐	☐
	Force.com - App Subscription User	☐	☐
	Gold Partner User	☐	☐
	High Volume Customer Portal	☐	☐
	Identity User	☐	☐
	Marketing User	☐	☐
	Partner App Subscription User	☐	☐
	Partner Community Login User	☐	☐
	Partner Community User	☐	☐
	Read Only	☐	☐
	Silver Partner User	☐	☐
	Solution Manager	☐	☐
	Standard Platform User	☐	☐
	Standard User	☐	☐
	System Administrator	☒	☐
	Work.com Only User	☐	☐

3. Using Application

From the top right menu select Zebra Scoring and Qualification Tool. This app label can be changed or shortened in the previous step.



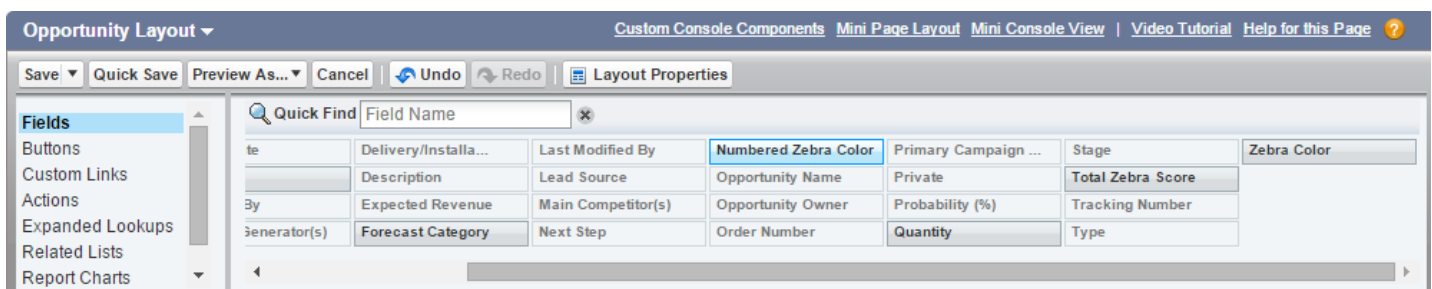
4. Opportunity View (Edit Layout)

From the Opportunity page select **Edit Layout** to add the objects you need to start scoring opportunities. Available **Fields** is selected in blue below. Additional fields from the managed package are listed:

Numbered Zebra Color - Zebra Score and Color in one Line

Total Zebra Score - Total of each of the seven attributes

Zebra Color - Red, Yellow, or Green



While you can use the Zebra Layouts as your opportunity page layouts, it's much more likely that you will choose to incorporate the Zebra features into your own opportunity page layouts. Here is our 5 step process for doing that.

1. Create a new **Section** by dragging the section **Field** into the Opportunity view. Edit the **Section Properties** and change **Section Name** to "Zebra Details" and add the following fields to that section

- **Zebra Score**
- **Zebra Color**

The screenshot shows the Salesforce Opportunity view editor. On the left, a sidebar lists various field types: Fields, Buttons, Custom Links, Actions, Expanded Lookups, Related Lists, and Report Charts. The 'Fields' section is selected. In the main area, a 'Quick Find' search bar is at the top. Below it, a table lists fields to be added to the section. The fields are: Close Date, Delivery/Installation Date, Last Modified By, Numbered Zebra Color, Primary Campaign Source, and Status. The 'Numbered Zebra Color' field is highlighted. Below the table, a 'Section' dropdown menu is open, showing the 'Zebra Details' section selected. The 'Zebra Details' section is highlighted in green. Below the section, a 'Description Information (Header visible on edit only)' section is visible, containing a 'Section' dropdown menu.

(Total Zebra Score will in practice will be between 0 and 28)

2. Create a related list for the Zebra Scores object that shows the break down for the different elemental opportunity scores with the following columns in order

- **Total Score**
- **Organization Score**
- **Operations Score**
- **Access to Power Score**
- **Funding Score**
- **Technology Score**
- **ROI Score**
- **Service Score**

The screenshot shows the Salesforce Opportunity view editor. On the left, a sidebar lists various field types: Fields, Buttons, Custom Links, Actions, Expanded Lookups, Related Lists, and Report Charts. The 'Related Lists' section is selected. In the main area, a 'Quick Find' search bar is at the top. Below it, a table lists related lists to be added to the section. The related lists are: Activity History, Competitors, Open Activities, Related Content, Approval History, Contact Roles, Orders, Stage History, Campaign Influence, Content Deliveries, Partners, Zebra Scores, Cases, Notes & Attachments, and Products. The 'Zebra Scores' related list is highlighted. Below the table, a 'Related Lists' section is visible, containing a 'Zebra Scores' dropdown menu. The 'Zebra Scores' section is highlighted in yellow. Below the section, a table shows the data for the 'Zebra Scores' related list. The table has 8 columns: Organization Score, Operations Score, Access to Power Score, Funding Score, ROI Score, Technology Score, Service Score, and Total Score. The data rows are: 33,060, 80,595, 48,850, 86,592, 64,090, 1,154, 48,001, and 16,384.

3. Remove the "New Zebra Scores" button from the Zebra Scores related list
4. Add the "Zebra Score" button to the custom buttons area on the page layout
5. Add the "Zebra Score" action to the publisher actions section of the page layout

Opportunity Detail [Edit](#) [Delete](#) [Clone](#) [Zebra Score](#)

Opportunity Owner		Amount	\$100,000.00
Private	☐	Expected Revenue	\$70,000.00
Opportunity Name	Dickenson Mobile Generators	Close Date	9/20/2012
Account Name	Dickenson plc	Next Step	
Type	New Customer	Stage	Perception Analysis
Lead Source	Purchased List	Probability (%)	70%
		Primary Campaign Source	
Created By	10/10/2014 4:57 PM	Last Modified By	10/17/2014 4:57 PM

▼ Zebra Details

Total Zebra Score 24 Zebra Color Green

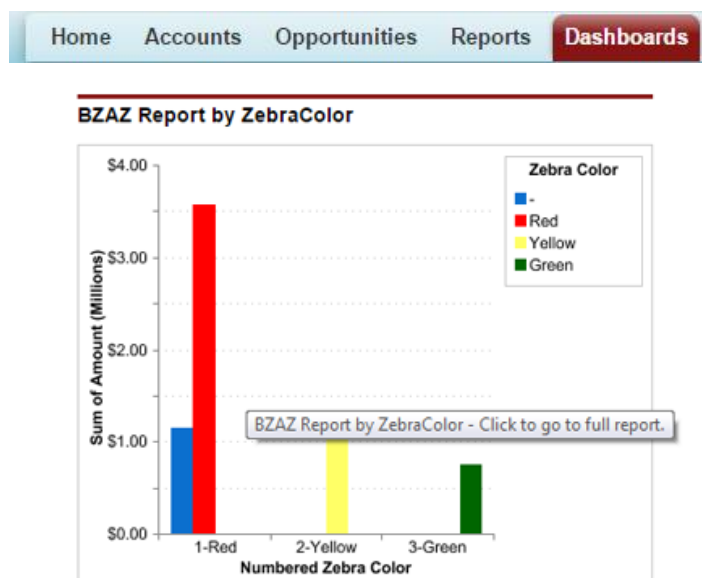
[Edit](#) [Delete](#) [Clone](#) [Zebra Score](#)

Zebra Scores [New Zebra Score](#) [Zebra Scores Help ?](#)

Action	Organization Score	Operations Score	Access to Power Score	Funding Score	ROI Score	Technology Score	Service Score	Total Score
Edit Del	4	4	4	3	1	4	4	24

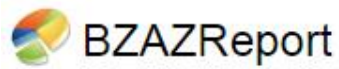
5. Dashboard

Select the Dashboard Tab to view the BZAZ Report. To configure the report click on the chart and you will be redirected to the full report. The blue column is the total value of deals that have no zebra score.



Click on BZAZ chart

Customize your report by adjusting the **Date Field** or any of the parameters you prefer, as shown below.



Report Generation Status: Complete

Brent Nauer

Report Options:

Summarize information by:

Numbered Zebra Color ▼

Time Frame

Date Field

Close Date ▼

Range

Custom ▼

From

To

Show

All opportunities ▼

Opportunity Status

Any ▼

Probability

All ▼

Run Report ▼

Hide Details

Customize

Save

Save As

Delete

Printable View

Export Details

Thank you for installing the Zebra Scoring and Qualification Tool. For further assistance please contact us at support@sellingtozebras.com