

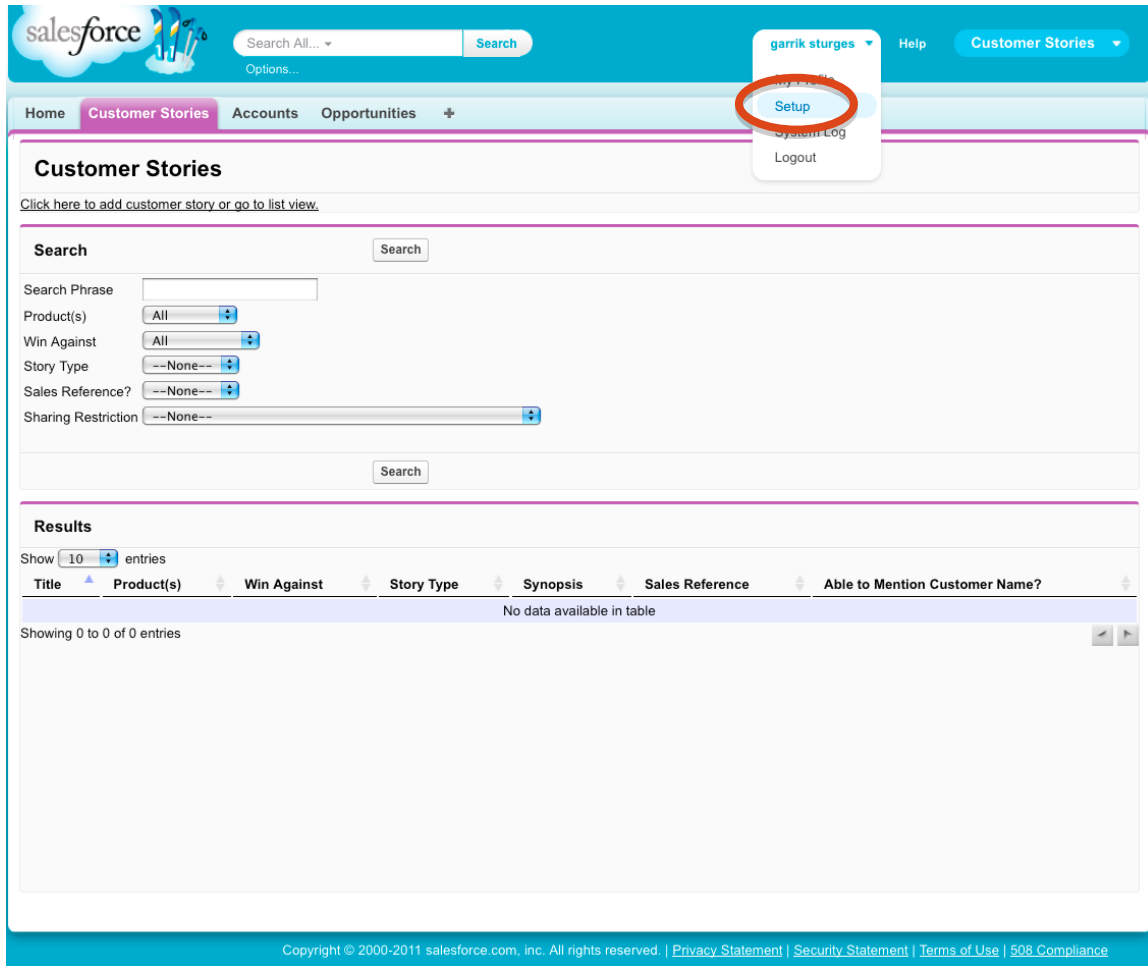
Customer Stories Basic Setup/Customization

Before using the Customer Stories application you will want to customize 2 picklist fields to tailor the app to your business. Follow these instructions to customize the “Product(s)” and “Win Against” lists.

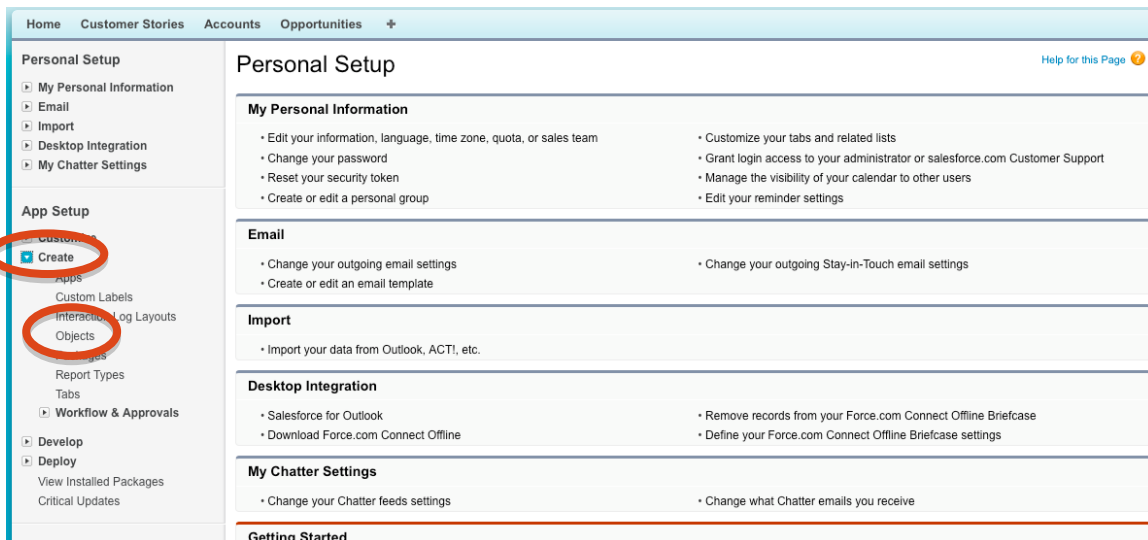
**You will need to have admin privileges to do this.*

1. On the top right hand of your screen, select your name/login and then ‘Setup’

The screenshot displays the Salesforce Customer Stories application interface. At the top, the navigation bar includes the Salesforce logo, a search bar, and a user profile dropdown menu for 'garrik sturges' which is circled in red. Below the navigation bar, the 'Customer Stories' section is active, showing a search form with fields for Search Phrase, Product(s), Win Against, Story Type, Sales Reference?, and Sharing Restriction. The results section shows a table with columns: Title, Product(s), Win Against, Story Type, Synopsis, Sales Reference, and Able to Mention Customer Name?. The table is currently empty, displaying 'No data available in table'.



2. Select 'Create' → 'Objects'



3. Select 'CustomerStory'

Home Customer Stories Accounts Opportunities +

Personal Setup

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

App Setup

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

Administration Setup

Custom Objects

Custom objects are database tables that allow you to store data specific to your organization in salesforce.com. You can use custom objects to extend salesforce.com functionality or to build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the Force.com API.

New Custom Object

Action	Label	Master Object	Deployed	Description
Edit Del	CustomerStory		✓	

4. Select 'Products'

Custom Fields & Relationships New Field Dependencies Set History Tracking [Custom Fields & Relationships Help](#)

Action	Field Label	API Name	Data Type	Controlling Field	Modified By	Track History
Edit Del	Able to Mention Customer Name?	sharingR__c	Formula (Text)		garrik sturges, 1/19/2011 10:44 AM	☐
Edit Del	Account	Account__c	Lookup(Account)		garrik sturges, 1/19/2011 10:44 AM	☐
Edit Del	Business Focus	Business_Focus__c	Text(200)		garrik sturges, 1/19/2011 10:44 AM	☐
Edit Del	Contact	Contact__c	Lookup(Contact)		garrik sturges, 1/19/2011 10:44 AM	☐
Edit Del Replace	Products	Products__c	Picklist (Multi-Select)		garrik sturges, 1/19/2011 10:44 AM	☐
Edit Del	Quotes	Lessons_Learned__c	Long Text Area(10000)		garrik sturges, 1/19/2011 10:44 AM	☐
Edit Del	Related Opportunity	Related_Opportunity__c	Lookup(Opportunity)		garrik sturges, 1/19/2011 10:44 AM	☐
Edit Del Replace	Sales Reference	Sales_Reference__c	Picklist		garrik sturges, 1/19/2011 10:44 AM	☐
Edit Del Replace	Sharing Restrictions	Sharing_Restriction__c	Picklist		garrik sturges, 1/19/2011 10:44 AM	☐
Edit Del Replace	Status	Status__c	Picklist		garrik sturges, 1/19/2011 10:44 AM	☐
Edit Del	Story	Solutions__c	Rich Text Area(20000)		garrik sturges, 1/19/2011 10:44 AM	☐
Edit Del	Story Owner	Story_Owner__c	Lookup(User)		garrik sturges, 1/19/2011 10:44 AM	☐
Edit Del Replace	Story Type	Story_Type__c	Picklist		garrik sturges, 1/19/2011 10:44 AM	☐
Edit Del	Synopsis	Synopsis__c	Long Text Area(400)		garrik sturges, 1/19/2011 10:44 AM	☐
Edit Del	Team	Team__c	Text(255)		garrik sturges, 1/19/2011 10:44 AM	☐
Edit Del	Use Contact As Reference?	callRef__c	Formula (Text)		garrik sturges, 1/19/2011 10:44 AM	☐
Edit Del Replace	Win Against	Win_Against__c	Picklist (Multi-Select)		garrik sturges, 1/19/2011 10:44 AM	☐

5. Scroll down to 'Picklist Values.' Here you can edit, delete, and create new values for the multi picklist. In this example we will be editing/changing a value. Select 'Edit' next to Product1.

Picklist Values			
New Reorder Replace Printable View Picklist Values Help			
Action	Values	Default	Modified By
Edit Del	Product 1	☐	garrik sturges, 1/19/2011 10:44 AM
Edit Del	Product 2	☐	garrik sturges, 1/19/2011 10:44 AM
Edit Del	Service 1	☐	garrik sturges, 1/19/2011 10:44 AM
Edit Del	Service 2	☐	garrik sturges, 1/19/2011 10:44 AM

6. Type in a new name, then select 'Save'

Picklist Edit [Help for this Page](#)

Products

Enter a name for the picklist value below. Check the box to use this value as the default value.

Products

Default ☐ Make this value the default for the master picklist

[Save](#) [Cancel](#)

Picklist Edit [Help for this Page](#)

Products

Enter a name for the picklist value below. Check the box to use this value as the default value.

Products

Default ☐ Make this value the default for the master picklist

[Save](#) [Cancel](#)

7. You should see the new/edited value in the 'Picklist Values' area

Picklist Values			
New Reorder Replace Printable View Picklist Values Help			
Action	Values	Default	Modified By
Edit Del	Widget	☐	garrik sturges, 1/19/2011 11:37 AM
Edit Del	Product 2	☐	garrik sturges, 1/19/2011 10:44 AM
Edit Del	Service 1	☐	garrik sturges, 1/19/2011 10:44 AM
Edit Del	Service 2	☐	garrik sturges, 1/19/2011 10:44 AM

8. When you create a new Customer Story, you will now see your new product as an option.

CustomerStory Edit

Save

Save & New

Cancel

Snapshot

I = Required

Title

Synopsis

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Story Type

[illegible]

Win Against

Available		Chosen
Competitor 1	▶	
Competitor 2	▶	

Products

Available
Widget
Product 2

Status



Customer Story

Story

Quotes