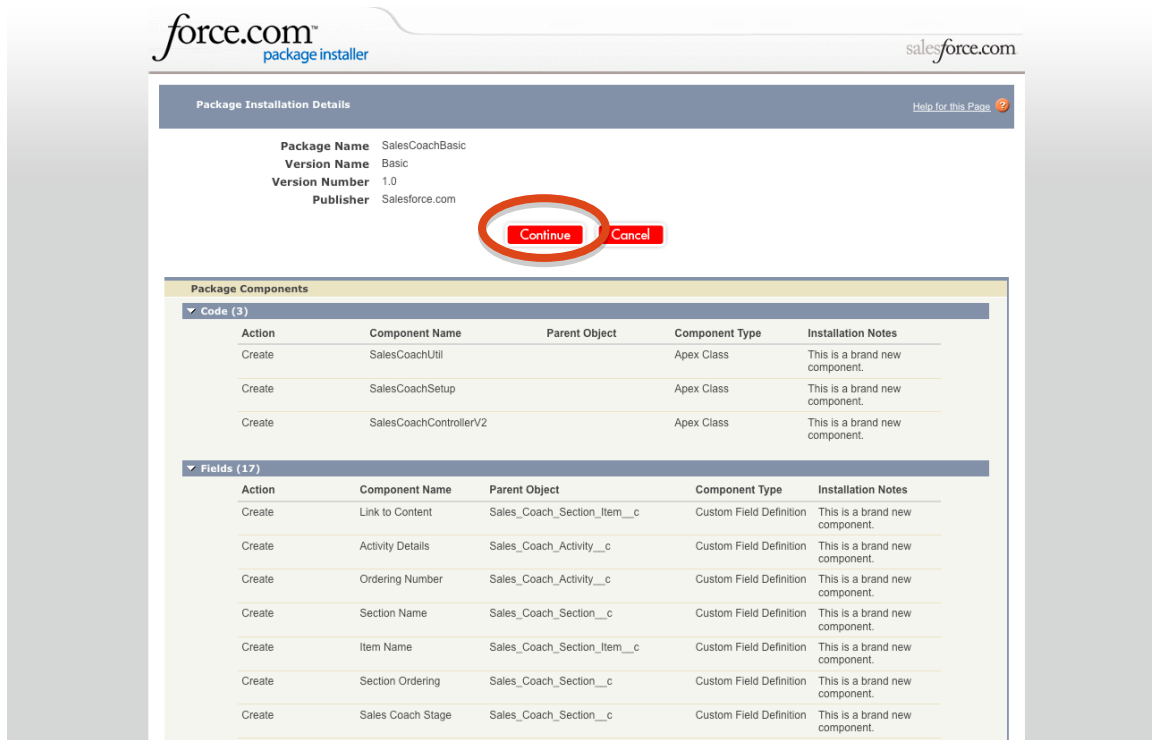


Sales Coach Install Instructions

Once you have selected the SalesCoach package and decided to install, please follow these instructions.

1. Select 'Continue.'



The screenshot shows the Salesforce Package Installer interface. At the top, the 'force.com package installer' logo is on the left and the 'salesforce.com' logo is on the right. Below the logos is a section titled 'Package Installation Details' with a 'Help for this Page' link. This section displays the following information:

- Package Name:** SalesCoachBasic
- Version Name:** Basic
- Version Number:** 1.0
- Publisher:** Salesforce.com

Below this information are two buttons: 'Continue' and 'Cancel'. The 'Continue' button is highlighted with a red circle. Below the buttons is a section titled 'Package Components' which contains two expandable sections: 'Code (3)' and 'Fields (17)'.

Code (3)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	SalesCoachUtil		Apex Class	This is a brand new component.
Create	SalesCoachSetup		Apex Class	This is a brand new component.
Create	SalesCoachControllerV2		Apex Class	This is a brand new component.

Fields (17)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Link to Content	Sales_Coach_Section_Item__c	Custom Field Definition	This is a brand new component.
Create	Activity Details	Sales_Coach_Activity__c	Custom Field Definition	This is a brand new component.
Create	Ordering Number	Sales_Coach_Activity__c	Custom Field Definition	This is a brand new component.
Create	Section Name	Sales_Coach_Section__c	Custom Field Definition	This is a brand new component.
Create	Item Name	Sales_Coach_Section_Item__c	Custom Field Definition	This is a brand new component.
Create	Section Ordering	Sales_Coach_Section__c	Custom Field Definition	This is a brand new component.
Create	Sales Coach Stage	Sales_Coach_Section__c	Custom Field Definition	This is a brand new component.

2. Select 'Next.'

salesforce.com **11.0** **service**

Setup · System Log · Help & Training · Logout

force.com apps Call Center

Home Console Accounts Contacts Cases Article Management Articles Solutions Reports Dashboards Workspaces Google Docs

Package Installer
SalesCoachBasic

Help for this Page

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		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.

Next Cancel

Home | Console | Accounts | Contacts | Cases | Article Management | Articles | Solutions | Reports | Dashboards | Workspaces | Google Docs | All Tabs
Copyright © 2000-2009 salesforce.com, inc. All rights reserved. | [Privacy Statement](#) | [Security Statement](#) | [Terms of Use](#) | [508 Compliance](#)

3. Select the security settings you would like and then select 'Next.'

salesforce.com **11.0** **service**

Setup · System Log · Help & Training · Logout

force.com apps Call Center

Home Console Accounts Contacts Cases Article Management Articles Solutions Reports Dashboards Workspaces Google Docs

Package Installer
SalesCoachBasic

Help for this Page

Step 2. Choose security level Step 2 of 3

Select security settings

☒ Admin access only Best for limited deployments. Users with your profile will have full access.

☐ Grant access to all users All user profiles will have full access

☐ Select security settings Recommended for most packages

Previous **Next** Cancel

Home | Console | Accounts | Contacts | Cases | Article Management | Articles | Solutions | Reports | Dashboards | Workspaces | Google Docs | All Tabs
Copyright © 2000-2009 salesforce.com, inc. All rights reserved. | [Privacy Statement](#) | [Security Statement](#) | [Terms of Use](#) | [508 Compliance](#)

4. Select the "Ignore Apex test failures that may cause the installed application not to function properly," and then select 'Install.'

salesforce.com **CRM** **11.0** **service**

Setup System Log Help & Training Logout

force.com apps Call Center

Home Console Accounts Contacts Cases Article Management Articles Solutions Reports Dashboards Workspaces Google Docs

Package Installer
SalesCoachBasic

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

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
- Create
- Develop
- Deploy
- View Installed Packages
- Critical Updates

Administration Setup

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

Checkout

- Checkout Summary

Home | Console | Accounts | Contacts | Cases | Article Management | Articles | Solutions | Reports | Dashboards | Workspaces | Google Docs | All Tabs

Copyright © 2000-2009 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance

5. Select 'Deploy Now.'

salesforce.com **CRM** **11.0** **service**

Setup System Log Help & Training Logout

force.com apps Call Center

Home Console Accounts Contacts Cases Article Management Articles Solutions Reports Dashboards Workspaces Google Docs

Install complete

Help for this Page

The components contained in this package have been successfully installed.

The final steps in the install process are to:

1. Change the visibility settings for any installed documents, reports, dashboards, letterheads, email templates, and custom fields on standard objects. By default, these components are visible to all users.
2. Set the Running User for any installed dashboards or analytic snapshots; by default, it is set to you.
3. Specify the appropriate recipients for any installed workflow tasks.
4. Specify the appropriate assignees for any installed workflow alerts.
5. Specify the appropriate user for workflow field updates that modify the Owner field or user lookups; by default, it is set to you.
6. Create a schedule for any installed analytic snapshots.
7. Configure any additional settings for this package from the package detail page.

Deploy the package by clicking **Deploy Now** below. You can also do this at any time in the future from the package detail page.

Deploy Now Deploy Later

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
- Create
- Develop
- Deploy
- View Installed Packages
- Critical Updates

Administration Setup

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

Checkout

- Checkout Summary

Home | Console | Accounts | Contacts | Cases | Article Management | Articles | Solutions | Reports | Dashboards | Workspaces | Google Docs | All Tabs

Copyright © 2000-2009 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance

6. Select 'Deploy.'

salesforce.com

service

Setup · System Log · Help & Training · Logout

force.com

apps

Call Center

Home

Console

Accounts

Contacts

Cases

Article Management

Articles

Solutions

Reports

Dashboards

Workspaces

Google Docs

Personal Setup

My Personal Information

Email

Import

Desktop Integration

App Setup

Customize

Create

Develop

Deploy

View Installed Packages

Critical Updates

Administration Setup

Manage Users

Company Profile

Security Controls

Communication Templates

Data Management

Monitoring

Mobile Administration

Desktop Administration

Email Administration

Google Apps

Checkout

Checkout Summary

Deploy Package

Help for this Page

Click Deploy to make Custom Objects, Workflow Rules, or Custom Report Types in this package available to users who have access to them based on their profile.

Package Components

Action	Name	Parent Object	Type
	Sales Coach Activity		Custom Object Definition
	Sales Coach Admin		Custom Object Definition
	Sales Coach Role		Custom Object Definition
	Sales Coach Section		Custom Object Definition
	Sales Coach Section Item		Custom Object Definition
	Sales Coach Stage		Custom Object Definition

Deploy

Cancel

Home

Console

Accounts

Contacts

Cases

Article Management

Articles

Solutions

Reports

Dashboards

Workspaces

Google Docs

All Tabs

Copyright © 2000-2009 salesforce.com, inc. All rights reserved.

Privacy Statement

Security Statement

Terms of Use

508 Compliance

7. Your screen should look similar to the picture below.

salesforce.com **24/7** **service** [Setup](#) [System Log](#) [Help & Training](#) [Logout](#) [force.com apps](#) [Call Center](#)

Home Console Accounts Contacts Cases Article Management Articles Solutions Reports Dashboards Workspaces Google D 

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
- Create
- Develop
- Deploy
- View Installed Packages
- Critical Updates

Administration Setup

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

Checkout

- Checkout Summary

Package Details
SalesCoachBasic [Help for this Page](#)

[Back to List](#)

Installed Package Detail

[Uninstall](#) [Deploy](#) [Show Dependencies](#)

Package Name	SalesCoachBasic	Version Number	1.0
Version Name	Basic	Package Type	Unmanaged
Publisher	Salesforce.com	API Access	Unrestricted [Enable Restrictions]
Description			
Installed By	Admin User, 12/14/2009 9:42 AM	Modified By	Admin User, 12/14/2009 9:42 AM

Uninstall

Deploy

Show Dependencies

Package Components

Action Name	Parent Object	Type
Active?	Sales Coach Stage	Custom Field Definition
Activity Details	Sales Coach Activity	Custom Field Definition
All	Sales Coach Role	List View
Display	Sales Coach Section Item	Custom Field Definition
Item Name	Sales Coach Section Item	Custom Field Definition
Link to Content	Sales Coach Section Item	Custom Field Definition
Ordering Number	Sales Coach Activity	Custom Field Definition
Products	Sales Coach Section Item	Custom Field Definition
Sales Coach Activity		Custom Object Definition
Sales Coach Activity Layout	Sales Coach Activity	Page Layout
Sales Coach Admin		Custom Object Definition
Sales Coach Admin Layout	Sales Coach Admin	Page Layout
Sales Coach Role		Custom Object Definition
Sales Coach Role Layout	Sales Coach Role	Page Layout
Sales Coach Section	Sales Coach Section Item	Custom Field Definition
Sales Coach Section		Custom Object Definition
Sales Coach Section Item		Custom Object Definition
Sales Coach Section Item Layout	Sales Coach Section Item	Page Layout
Sales Coach Section Layout	Sales Coach Section	Page Layout
Sales Coach Setup		Custom Tab Definition
Sales Coach Stage	Sales Coach Activity	Custom Field Definition
Sales Coach Stage		Custom Object Definition
Sales Coach Stage	Sales Coach Section	Custom Field Definition
Sales Coach Stage Layout	Sales Coach Stage	Page Layout
SalesCoachControllerV2		Apex Class
SalesCoachLauncher		Visualforce Page
SalesCoachSaasy		Static Resource
SalesCoachSetup		Apex Class

9. Select 'Customize My Tabs.'

salesforce.com  Setup System Log Help & Training Logout force.com apps Call Center

Home Console Accounts Contacts Cases Article Management Articles Solutions Reports Dashboards Workspaces Google Docs

All Tabs [Help for this Page](#)

Use the links below to quickly navigate to a tab. Alternatively, you can [add a tab](#) to your display to better suit the way you work.

View: All Tabs Add Tabs to Your Default Display [Customize My Tabs](#)

 Accounts Tell me more!	 Ideas
 Answers Tell me more!	 Ideas in Action
 Article Management	 Invoices
 Articles	 Leads Tell me more!
 Availability Calendar	 Mass Locate Accounts
 Budgets	 Milestones
 Bugs	 My Time-Off Balance
 Calendar Sync	 Objectives
 Campaigns Tell me more!	 Opportunities Tell me more!
 Campaign Timeline	 Orders
 Case Initializer	 Org Documentation
 Cases Tell me more!	 Pages
 Channel Plans	 Page Templates
 Community	 Pay Cycles
 Components	 Payroll Systems
 Connections	 PKB Site Setup
 Console	 Portals
 Contacts Tell me more!	 Products Tell me more!
 Content	 Program Assets
 Contracts Tell me more!	 Program Contacts
 Contribute	 Projects
 Corporate Travel	 Quotes
 Dashboards Tell me more!	 Register Pollster
 DateShifter	 Reports Tell me more!

10. In the “Available Tabs” list find select ‘Sales Coach Setup,’ then select ‘Add.’

salesforce.com 24/7 service

Setup · System Log · Help & Training · Logout

force.com apps Call Center

Home Console Accounts Contacts Cases Article Management Articles Solutions Reports Dashboards Workspaces Google Docs

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
- Create
- Develop
- Deploy
- View Installed Packages
- Critical Updates

Administration Setup

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

Checkout

- Checkout Summary

Customize My Tabs [Help for this Page](#)

Choose the tabs that will display in each of your apps.

Custom App: Call Center

Available Tabs

- Resources
- Sales Coach Setup**
- Stop Statuses
- Subscriptions
- Support Programs
- Surveys
- Team Calendar
- Test Cases
- Time
- Time-Off Balances

Selected Tabs

- Home (default)
- Console
- Accounts
- Contacts
- Cases
- Article Management
- Articles
- Solutions
- Reports
- Dashboards
- Workspaces

Save Cancel

Home | Console | Accounts | Contacts | Cases | Article Management | Articles | Solutions | Reports | Dashboards | Workspaces | Google Docs | All Tabs

Copyright © 2000-2009 salesforce.com, inc. All rights reserved. | [Privacy Statement](#) | [Security Statement](#) | [Terms of Use](#) | [508 Compliance](#)

11. Select 'Save.'

salesforce.com 24/7 service

Setup · System Log · Help & Training · Logout

force.com apps Call Center

Home Console Accounts Contacts Cases Article Management Articles Solutions Reports Dashboards Workspaces Google Docs Sales Coach Setup

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
- Create
- Develop
- Deploy
- View Installed Packages
- Critical Updates

Administration Setup

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

Checkout

- Checkout Summary

Customize My Tabs [Help for this Page](#)

Choose the tabs that will display in each of your apps.

Custom App: Call Center

Available Tabs

- Answers
- Availability Calendar
- Budgets
- Bugs
- Calendar Sync
- Campaigns
- Campaign Timeline
- Case Initializer
- Channel Plans
- Community
- Components

Selected Tabs

- Accounts
- Contacts
- Cases
- Article Management
- Articles
- Solutions
- Reports
- Dashboards
- Workspaces
- Google Docs
- Sales Coach Setup**

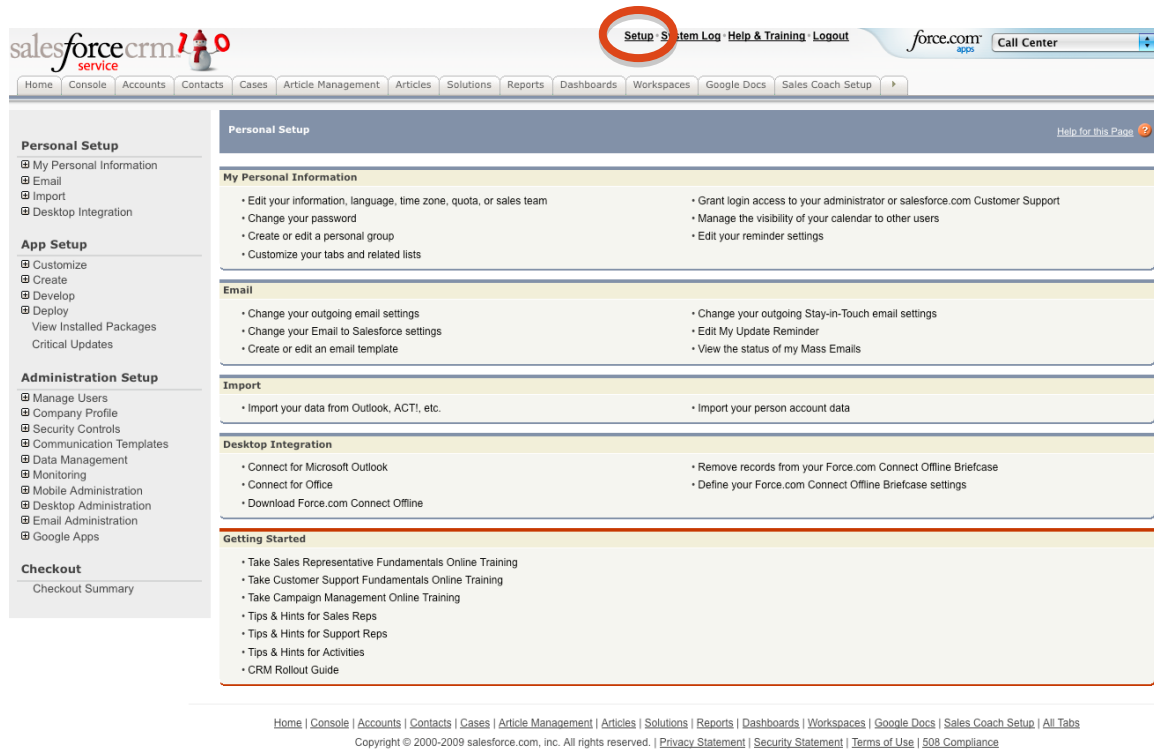
Save Cancel

Home | Console | Accounts | Contacts | Cases | Article Management | Articles | Solutions | Reports | Dashboards | Workspaces | Google Docs | Sales Coach Setup | All Tabs

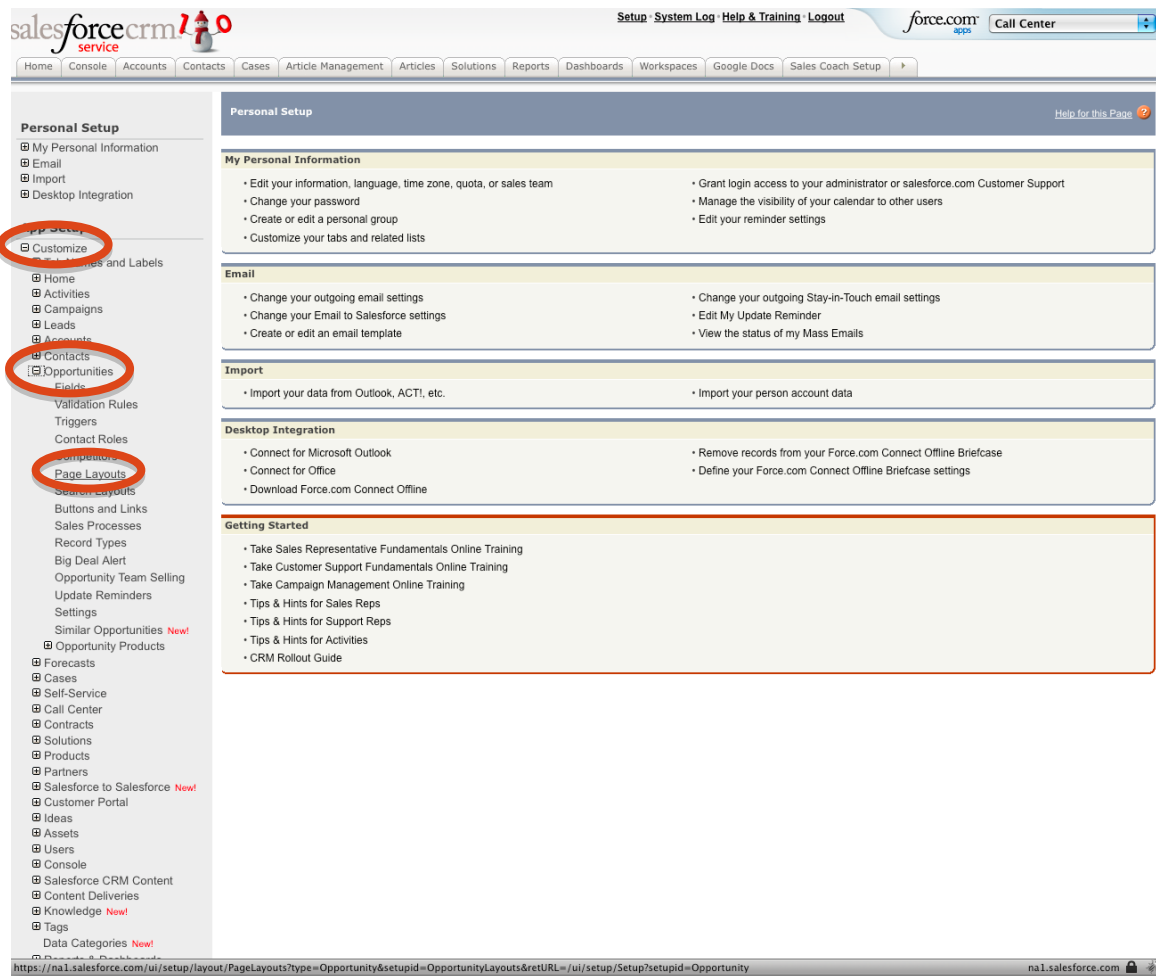
Copyright © 2000-2009 salesforce.com, inc. All rights reserved. | [Privacy Statement](#) | [Security Statement](#) | [Terms of Use](#) | [508 Compliance](#)

****This section will add the Sales Coach Button to your opportunity layouts****

12. At the top right-hand side of your page, select 'Setup.'



13. Select 'Customize' → 'Opportunities' → 'Page Layouts.'



14. Next to the first layout you would like the Sales Coach Button to be on, select 'Edit.'

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts
 - Contacts
 - Opportunities
 - Fields
 - Validation Rules
 - Triggers
 - Contact Roles
 - Competitors
 - Page Layouts
 - Search Layouts
 - Buttons and Links
 - Sales Processes
 - Record Types
 - Big Deal Alert
 - Opportunity Team Selling
 - Update Reminders
 - Settings
 - Similar Opportunities **New!**
 - Opportunity Products
- Forecasts
- Cases
- Self-Service
- Call Center
- Contracts
- Solutions
- Products
- Partners
- Salesforce to Salesforce **New!**
- Customer Portal
- Ideas
- Assets
- Users
- Console

Advanced

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

Buttons

- Buttons
- Visualforce Pages
- Custom S-Controls
- Related Lists

Quick Find Button Name

- Clone
- Create Project
- Delete
- Edit
- Sales Coach
- Submit for Approval

Opportunity Sample

Standard Buttons Custom Buttons Personal: Sample Tag Public: Sample Tag

Opportunity Detail

Opportunity Information (Header visible on edit only)			
Opportunity Owner	Sample User	Amount	\$123.45
Opportunity Name	Sample Opportunity Name	Close Date	12/14/2009
Account Name	Sample Account	Probability (%)	550%
Type	Sample Type	Stage	Sample Stage
Forecast Category	Sample Forecast Category	Reason Lost	Sample Reason Lost
Created Date	12/14/2009	Winning Competitor	Sample Winning Competitor
Marketing/Advanced Tracking			
Primary Campaign Source	Sample Campaign	Status Indicator	Sample Status Indicator
Lead Source	Sample Lead Source	Closing Countdown	193.16
Description Information			
Next Step	Sample Next Step		
Description	Sample Description		
Useful Links (Header visible on detail only)			
Discount Information			
Implementation Plans			
System Information			
Partner Account	Sample Account	Opportunity Record Type	[Change]
Created By	Sample User	Last Modified By	Sample User

Contact Roles

This list is not customizable

salesforce service **17.0** Setup System Log Help & Training Logout force.com apps Call Center

Home Console Accounts Contacts Cases Article Management Articles Solutions Reports Dashboards Workspaces Google Docs Sales Coach Setup

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts
 - Contacts
 - Opportunities
 - Fields
 - Validation Rules
 - Triggers
 - Contact Roles
 - Competitors
 - Page Layouts
 - Search Layouts
 - Buttons and Links
 - Sales Processes
 - Record Types
 - Big Deal Alert
 - Opportunity Team Selling
 - Update Reminders
 - Settings
 - Similar Opportunities **New!**
 - Opportunity Products
- Forecasts
- Cases
- Self-Service
- Call Center
- Contracts
- Solutions
- Products
- Partners
- Salesforce to Salesforce **New!**
- Customer Portal
- Ideas
- Assets
- Users
- Console
- Salesforce CRM Content
- Content Deliveries
- Knowledge **New!**
- Tags

Advanced
Mini Page Layout Mini Console View Video Tutorial Help for this Page

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

Quick Find Button Name

Clone Sales Coach
Create Project Sharing
Delete Submit for Approval
Edit

Opportunity Sample
Tags Personal: Sample Tag Public: Sample Tag

Opportunity Detail
Standard Buttons Custom Buttons
Edit Delete Clone Share Create Project Sales Coach

Opportunity Information (Header visible on edit only)

Opportunity Owner	Sample User	Amount	\$123.45
Opportunity Name	Sample Opportunity Name	Close Date	12/14/2009
Account Name	Sample Account	Probability (%)	550%
Type	Sample Type	Stage	Sample Stage
Forecast Category	Sample Forecast Category	Reason Lost	Sample Reason Lost
Created Date	12/14/2009	Winning Competitor	Sample Winning Competitor

Marketing/Advanced Tracking

Primary Campaign Source	Sample Campaign	Status Indicator	Sample Status Indicator
Lead Source	Sample Lead Source	Closing Countdown	193.16

Description Information

Next Step	Sample Next Step
Description	Sample Description

Useful Links (Header visible on detail only)

Discount Information

Implementation Plans

System Information

Partner Account	Sample Account	Opportunity Record Type	[Change]
Created By	Sample User	Last Modified By	Sample User

Contact Roles

This list is not customizable

Products
Add Product Edit All Choose Price Book Sort

Product	Product Code	Quantity	List Price	Sales Price	Discount %	Total Price	Schedule	Date
---------	--------------	----------	------------	-------------	------------	-------------	----------	------

16. Select 'Save.'

salesforce.com **17**  **service**

Setup · System Log · Help & Training · Logout

force.com apps Call Center

Home Console Accounts Contacts Cases Article Management Articles Solutions Reports Dashboards Workspaces Google Docs Sales Coach Setup

Advanced Mini Page Layout Mini Console View Video Tutorial Help for this Page

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts
 - Contacts
 - Opportunities
 - Fields
 - Validation Rules
 - Triggers
 - Contact Roles
 - Competitors
 - Page Layouts
 - Search Layouts
 - Buttons and Links
 - Sales Processes
 - Record Types
 - Big Deal Alert
 - Opportunity Team Selling
 - Update Reminders
 - Settings
 - Similar Opportunities *New!*
 - Opportunity Products
- Forecasts
- Cases
- Self-Service
- Call Center
- Contracts
- Solutions
- Products
- Partners
- Salesforce to Salesforce *New!*
- Customer Portal
- Ideas
- Assets
- Users
- Console
- Salesforce CRM Content
- Content Deliveries
- Knowledge *New!*
- Tags

Buttons

Quick Find Button Name

Clone	Sales Coach
Create Project	Sharing
Delete	Submit for Approval
Edit	

Opportunity Sample

Tags Personal: Sample Tag Public: Sample Tag

Opportunity Detail

Standard Buttons: Edit Delete Clone Sharing Custom Buttons: Create Project Sales Coach

Opportunity Information (Header visible on edit only)

Opportunity Owner	Sample User	Amount	\$123.45
Opportunity Name	Sample Opportunity Name	Close Date	12/14/2009
Account Name	Sample Account	Probability (%)	550%
Type	Sample Type	Stage	Sample Stage
Forecast Category	Sample Forecast Category	Reason Lost	Sample Reason Lost
Created Date	12/14/2009	Winning Competitor	Sample Winning Competitor

Marketing/Advanced Tracking

Primary Campaign Source	Sample Campaign	Status Indicator	Sample Status Indicator
Lead Source	Sample Lead Source	Closing Countdown	193.16

Description Information

Next Step	Sample Next Step
Description	Sample Description

Useful Links (Header visible on detail only)

Discount Information

Implementation Plans

System Information

Partner Account	Sample Account	Opportunity Record Type	[Change]
Created By	Sample User	Last Modified By	Sample User

Contact Roles

This list is not customizable

Products

Add Product Edit All Choose Price Book Sort

Product	Product Code	Quantity	List Price	Sales Price	Discount %	Total Price	Schedule	Date
---------	--------------	----------	------------	-------------	------------	-------------	----------	------

17. For all other opportunity layouts you would like to have the 'Sales Coach' button, repeat steps 14-16.

18. Sales Coach is now installed. You will now need to customize it for your organizations. Please refer to the SalesCoachSetup.pdf documentation on how to do that correctly.