Introduction

Welcome to ProcessEZ, an application that manages workflow and repeatable processes within your Salesforce CRM. It is designed to allow firms to build process templates that clearly define operational policy procedures in one convenient repository. ProcessEZ is the affordable way to ensure operational excellence with consistency throughout your organization.

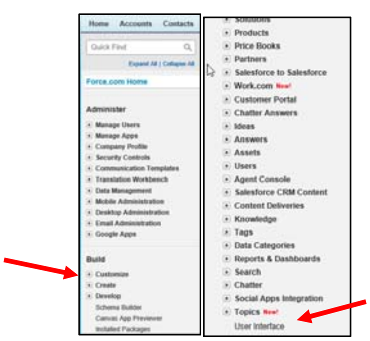
We hope that you enjoy your free trial!

Before You Get Started

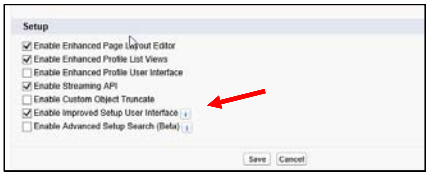
During configuration of ProcessEZ, you will work in the Setup area. This is the area that System Administrators use to set up Accounts, Contacts, Users, Company Information and other details of the application. There are two possibilities for finding Setup in your ProcessEZ interface (screen view). If you are currently using a trial version of Salesforce, it is likely already visible in the upper right corner of your interface, next to your name. If you are a new trial user and this is the first time you've configured any portion of ProcessEZ or Salesforce, it may not be present on the Home page of the interface. If it is not present, next to your name, follow these steps to make it visible.

1. Click on your **Name**.
2. Choose **Setup** from the dropdown menu.

3. Open **Build** in the left side menu.
   a. Open **Customize**.
   b. Scroll to the bottom of the *Customize* menu and click **User Interface**.



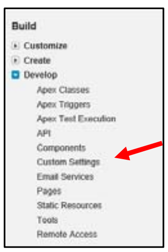
4. Scroll down to the Setup section and check the box which reads: **Enable Improved User Interface**.



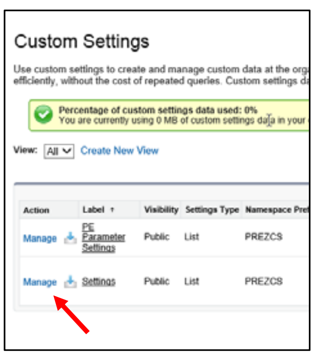
5. Click **Save**. When you return to the main screen, the **Setup** label will be *visible* next to your name.

Setting the Custom Setting

1. Click the **Setup** label
2. Open **Develop** in the *left side menu*
3. **3.** Choose **Custom Settings**

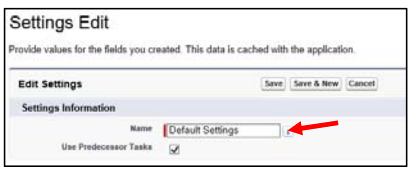


4. Click **Manage** next to a **Settings**. (Note: Do not click on the Setting label.)



5. On the **Custom Setting** Page, click the **New** button.

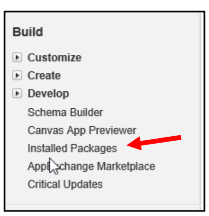
6. On the **Settings Edit** screen, complete as follows:
    a. Name: **Default Settings**
    b. Leave the **Use Predecessor Tasks** checkbox as "checked" (it should already be checked)



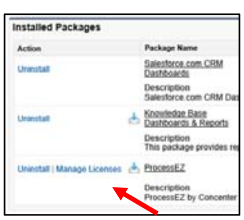
7. Click **Save**

Add Users to ProcessEZ Managed Package License

1. In the **Build** menu, click on **Installed Packages**.



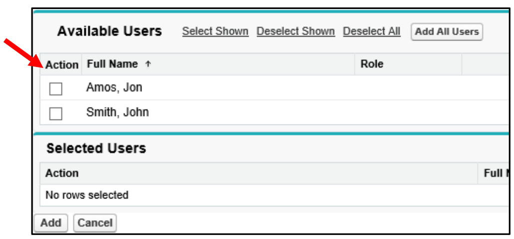
2. Select **Manage Licenses** next to the **ProcessEZ** label.



Your organization is allowed up to 5 licenses as part of the free 14-day trial.

3. Under the **Licensed Users** section, click the **Add Users** button**.**

4. Check the **Action** box for any users you want to add to the Trial.



5. Click the **Add** button in the lower left corner. The new Licensed User(s) will be in the list.

When done allocating users to the license, you can navigate out of Setup by clicking Home.

The users you set up should now be able to log into Salesforce and access the **ProcessEZ** application from the blue application drop-down in the upper right corner of the screen.

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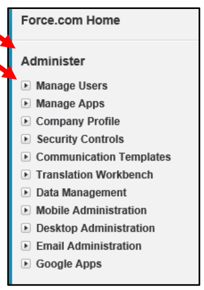
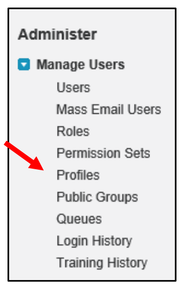
Modify Non-Admin Profiles to Have Access to ProcessEZ Objects

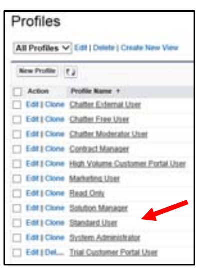
By default, when you install a custom package, Salesforce only provides access to that package and its custom objects to the System Administrator. Therefore, any users in your system that are not System Administrators need to be manually provided access to the application objects via a modification of their profile.

1. In the **Administer** menu, open **Manage Users**.
2. Select **Profiles**.





3. Select a **Profile** to edit and click on the *label*. (i.e., *Click Standard User, not the Edit or Clone button next to Standard User*.)



4. Click on **Edit** in the **Profile Detail** section.

5. Scroll down to the Custom Object Permissions and check the boxes for Read, Create, Edit, and Delete for the following Custom Objects:
    a. Process
    a. Process Steps
    b. Process Step Junctions
    c. Process Templates
    d. Process Template Steps
    e. Process Template Step Junctions

Custom Object Permissions

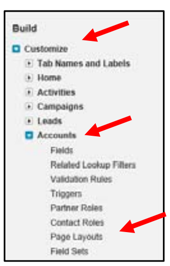
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Processes	✓	✓	✓	✓	✓	✓
Process Steps	✓	✓	✓	✓	✓	✓
Process Step Junctions	✓	✓	✓	✓	✓	✓
Process Templates	✓	✓	✓	✓	✓	✓
Process Template Steps	✓	✓	✓	✓	✓	✓
Process Template Step Junctions	✓	✓	✓	✓	✓	✓

6. Click **Save**.

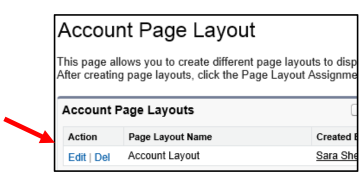
Add the Process Related List to Page Layouts

After deciding which objects you will use processes with, you will need to *configure* those objects to display the *Process Related list*. The example below demonstrates using processes with the *Account* object.

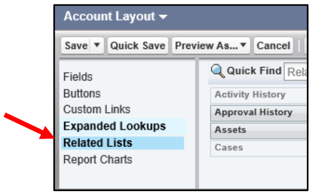
1. In the **Build** menu, select **Customize**.
2. Select **Accounts**.
3. Scroll down and click **Page Layouts**.



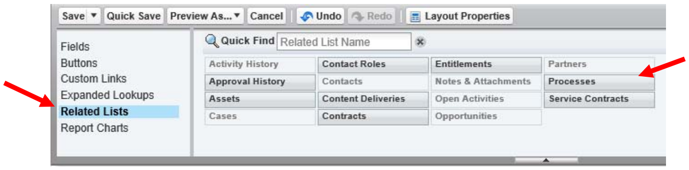
4. Click the **Edit** button next to the Page Layout you will edit.



5. Select **Related Lists** in the gray box at the top of your page.



Click and drag the **Processes** related list down onto the page layout.



6. Click **Save**.

Repeat **Steps 4 through 7** for other objects you wish to utilize **Processes** functionality.

If you would like to modify the list of fields being displayed by default in the related list, you can click on the wrench icon for the related list and make those modifications.

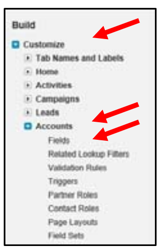
Configuring ProcessEZ to Use Process Roles

A process role is a user lookup field on a record. (For example, an account role may be the lead salesperson on an account. The reference to process roles is not related to standard SF role functionality.)

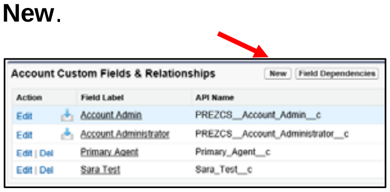
To customize your organization with your own role fields, follow these steps. The example shown is for the *Account* object:

First, **Create** the new custom field and **add** it to the respective Page Layout

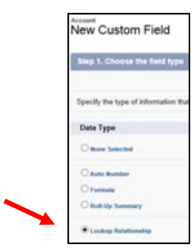
1. In the **Build** menu, select **Customize**.
2. Select **Accounts**.



3. Click on **Fields**.
4. Scroll down to the **Account Custom Fields & Relationships** section and click **New**.

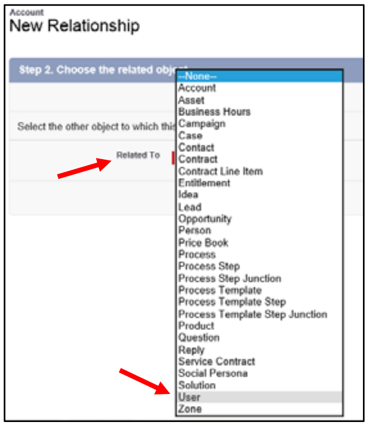


5. Select **Lookup Relationship**.

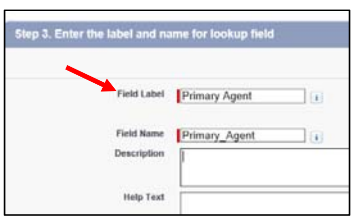


6. Click **Next** in the upper right corner of the step.

7. In the **Related To** dropdown box, select **User** and click **Next**.



8. In the **Field Label** box, name your new *Lookup Field* for a role. An example would be "Primary Agent."
9. Click **Next**.



10. Select the Profiles that should have visibility to this new field.
    a. <u>Visible</u>: Field is visible and **can be edited** by the User/Profile.
    b. <u>Read-only</u>: Field is visible and **cannot be edited** by the User/Profile.

11. Check the box next to the appropriate **Account Layout** page layout name.
12. Click **Save**.

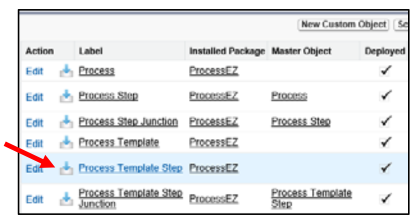
Repeat **Steps A through F** for any additional role fields that you wish to create for use on the **Account** object.

Note: You can use existing user lookup fields already on your page layouts where you want to use ProcessEZ. See instructions on the next page for how to add them to the template step assignment options.

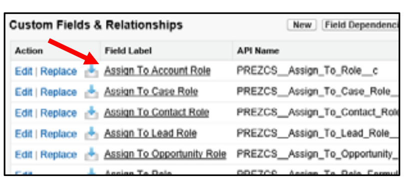
Add the New Role Name to the Appropriate Assign to Role

1. In the **Build** menu, select **Create**.
2. Select **Objects**.

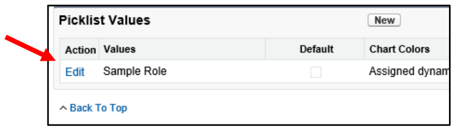
3. In **Custom Objects**, select **Process Template Step** label.



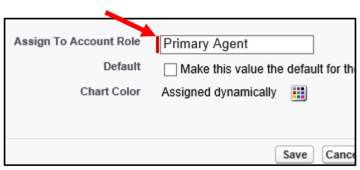
4. Scroll down to **Custom Fields & Relationships** and click the field label for the "Assign to" option that corresponds to the object where you want to use ProcessEZ. In our example, we will use "Assign to Account".



5. Scroll down to **Picklist Values**. (Note: Do not mistake for Picklist Options.)
6. Select **Edit** next to the sample role provided.



7. Change the name of this role to the name of the role you just created. The spelling and capitalization must exactly match the name of the user lookup field from the previous set of instructions.
8. Click **Save**.



If you created or want to use additional Roles, add them now to the Picklist Value for that Assigned to Role by selecting **New**. Make sure to add the name of the field exactly as it appears in the fields list.

NOTE: It is imperative that you name the role identical to the field name for the role. (Example: Primary Agent was the custom field role name, so the picklist value must also be Primary Agent.)

You may **Reorder** the **Picklist Values** if necessary.

Your new role(s) are now available for use in your *Process Templates*.

Repeat Steps 1 and 2 for other objects you wish to utilize the Roles functionality.

Configuring the Mass Create Process

You can use Mass Create Process functionality on any account or contact record. If you have Salesforce CRM Enterprise Edition, you can also use the **Mass Create Process** function on Leads, Cases and Opportunities.

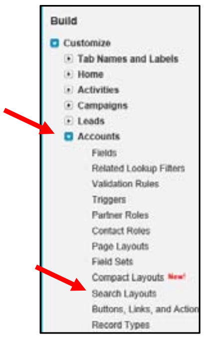
There will be instances when you will need begin a process for several records at once. Example: CPA's and Accountants during tax season who may want to instantiate one process for all clients whose tax preparation will be coming due.

You can create processes for multiple records using the **Create Processes** button which is available on the Record tab view. In order to display the button on these objects, follow these steps. In our example, we want to add the functionality to the Accounts tab.

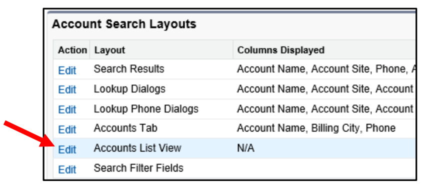
1. In the **Build** menu, select **Customize**.

2. Select **Accounts**.

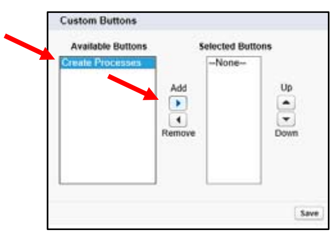
3. Scroll down and click **Search Layouts**.

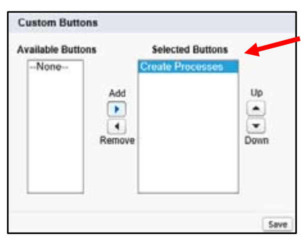


4. Select **Edit** next to the **Accounts List View** label.



5. From the Available Buttons list, choose **Create Processes** and click the add arrow to move it to “Selected Buttons.”





6. Click **Save**.

The new button will appear on the object tab once you select records to view.

Repeat these steps for any object where you want to use Mass Create Processes.

Salesforce Professional Edition Users Only – Special Configuration Required

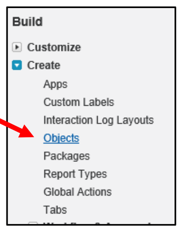
ProcessEZ is designed to use ***Security Profiles*** to grant permissions to the ProcessEZ objects and fields. Salesforce Profession Edition does ***not*** use *Security Profiles*, so in order for permissions to be granted, all fields used in the ProcessEZ application must be manually added to the ***Page Layouts***.

Following are the list of fields that must be added to your page layouts:

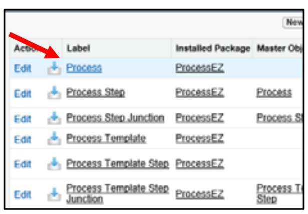
Object Name	Page Layout Name	Field Name	Section Name
Process	Process Layout	Auto Create Tasks	Detail Section
Process	Process Layout	Cancelled Steps	Detail Section
Process	Process Layout	Case	Process Related to Record
Process	Process Layout	Lead	Process Related to Record
Process	Process Layout	Opportunity	Process Related to Record
Process	Process Layout	Owner	System Information
Process	Process Layout	Exclude from Auto Create	System Information
Process	Process Layout	Percent Complete	System Information
	Process Layout		
Process Step	Process Step Layout	Assigned to Role	System Information
Process Step	Process Step Layout	Predecessor Step IDs	System Information
Process Step	Process Step Layout	Predecessor Steps	System Information
Process Step	Process Step Layout	Sequence	System Information
Process Step	Process Step Layout	Task Created	System Information
Process Template Step	Process Template Step Layout	Assign to Account Role	System Information
Process Template Step	Process Template Step Layout	Assign to Contact Role	System Information
Process Template Step	Process Template Step Layout	Assign to Case Role	System Information
Process Template Step	Process Template Step Layout	Assign to Lead Role	System Information
Process Template Step	Process Template Step Layout	Assign to Opportunity Role	System Information
Process Template Step	Process Template Step Layout	Predecessor Step IDs	System Information
Process Template Step	Process Template Step Layout	Predecessor Steps	System Information
Process Template Step	Process Template Step Layout	Sequence	System Information
Process Template Step Junction	Process Template Step Junction Layout	Predecessor Step	System Information
Task	Task Layout	Process Id	System Information
Task	Task Layout	Process Step Id	System Information

Follow the instructions below to add the necessary fields to the various Page layouts. Illustrated below is the example for the Process Object's, Auto Create field but the process is the same for placing fields on the page layouts.

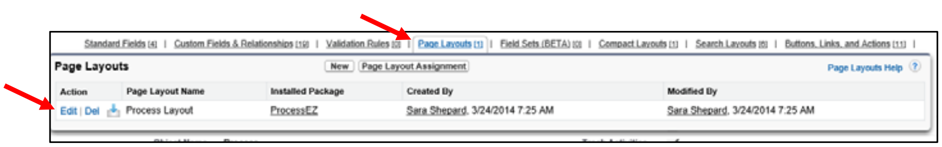
1. In the **Build** menu, select **Create**.
2. Scroll down and select **Objects**.



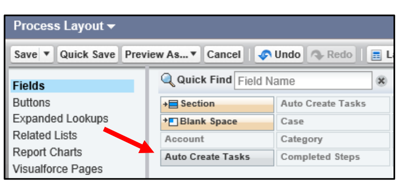
3. Click on the **Object** label (*do not click the Edit button* next to the Objects.)



4. Hover over the hyperlink across the top for **Page Layouts**.



5. Click **Edit**.
6. Under the list of available fields in the gray box at the top of the screen, drag the **Auto Create Tasks** field (checkbox) down into the **Detail** section of the page and drop it under the *Deadline* field.
7. Click **Save**.



Note: When creating a new process, the **Auto Create Tasks** checkbox is available as an option; however it is recommended that you do not check **Auto Create Tasks** at this time. Create the process and click **Save**. Any time after that you can edit the process to turn on **Auto Create Tasks**. This workaround is required in order to use ProcessEZ on Professional Edition.

Continue adding the remaining fields to the appropriate section of each object as shown in matrix above.

We Can Help!

As CERTIFIED SALESFORCE SALES CLOUD CONSULTANTs, our team is prepared to work with you to ensure your implementation is smooth and your ProcessEZ experience is rewarding. Concenter Services can assist your firm with training and with developing Process Templates to ensure consistency throughout your team's workflow. Contact us for a free consultation.