Funnel Gauge Installation Instructions

After successful installation of managed package, please follow the steps below to configure the application:

Update Account Page Layout

The Funnel Gauge Application has four fields that are to be added to the account page layout:

- Account Status
- Account Tier
- Account Profile
- Account Score

Please follow Salesforce's documentation on how to add fields to a page layout if you are not already familiar with the process.

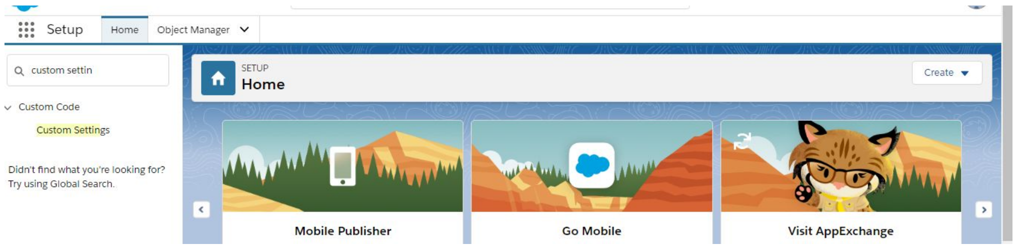
Additionally, there is the option of adding the Account Stage History related list if desired. All functionality will exist without adding it to the page but some admins may find it useful to see this information.

Update Account Status Field

The Account Status field is similar to the concept of a lead status field but applicable to the account object. Each companies' business processes will require that it be updated to meet your specific needs. If you do not use an account status field, you do not need to customize the values but you will not benefit from the account funnel reporting.

1. Create a record in custom setting name.

    - Go to => Setup => Custom Settings



    - After click on custom settings, Select custom setting name **FunnelGaugeCS,** and click on manage to create a new record.

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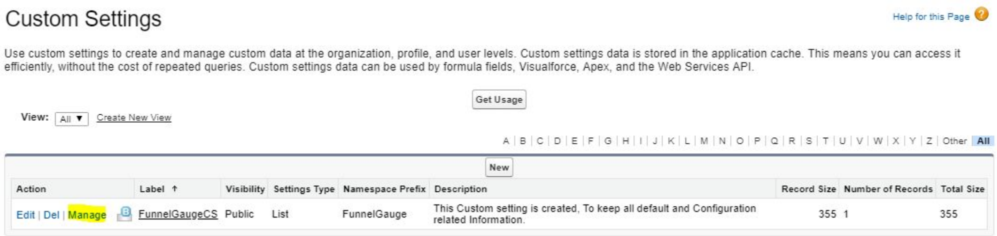
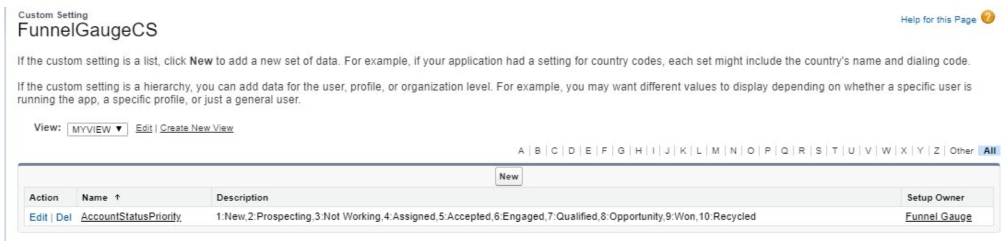


- Create a new Record with Name = ‘**AccountStatusPriority’**



*Note: To Create Account Status Priority, Please input Value in format like “Priority: Account Status pick-list value” and ‘,’ between two Account status values.

Example: 1:NEW, 2:Prospecting

Permission Set Assignment

To provision the Funnel Gauge application to users, the FunnelGaugePermission set will need to be applied to each user.

To Assign Permission Set to a user, please follow these steps:

1. Go to Users => Select the user that you wanted to give permission to use the Funnel Gauge application.

2. After Selecting the user, go to related list of Permission on User Details page as below and click edit assignments.

3. Select the permission set and click save.

FUNNEL GAUGE