



Kraytix FrontRunner Installation Guide

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Conventions

This document uses a number of typographical conventions to highlight text that refers to a user's interaction with Salesforce and/or FrontRunner:

- **Courier New Bold** font draws the reader's attention to user interface elements, such as buttons, command links and fields. Example: "Click the **save** button."
- `Courier New` font indicates values that need to be entered by the user. Example: "Enter Profiles in the **Quick Find** box."
- *Italicised Courier New* font indicates values that are displayed by Salesforce or FrontRunner. Example: "Check that the user is assigned the *Standard User* profile."

Document Version

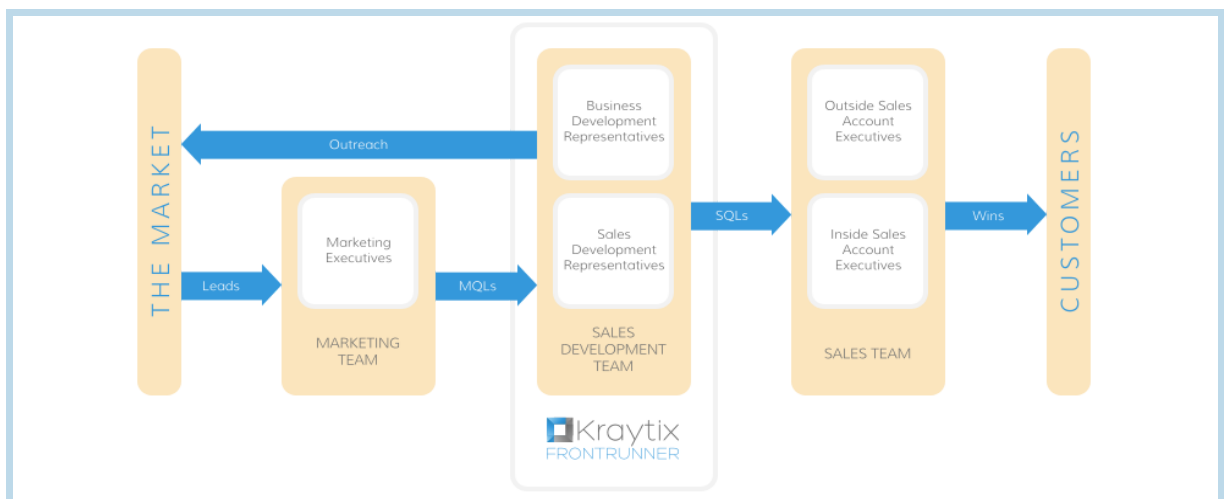
This document is compatible with Kraytix FrontRunner Version 1.11.

1 About FrontRunner

FrontRunner is a 100% native Salesforce® app that helps sales development teams consistently generate higher quality leads. It uses a structured approach to lead qualification to build a more accurate pipeline, improve close rates and increase revenue. With FrontRunner, companies can:

1. Build a library of Template Scorecards tailored to its products or services and to its ideal customer profiles. FrontRunner comes preconfigured with BANT, MAN and SCOTSMAN sample Template Scorecards that can be used as-is or cloned and modified. New Template Scorecards can also be created from scratch.
2. Create Snapshot Scorecards to see current, historical and trended levels of qualification using FrontRunner's red/amber/green traffic light views. Use Salesforce's standard and custom reports to analyse lead qualification performance.
3. Integrate FrontRunner with other apps; for example, automatically attach a Scorecard to a Lead when a marketing automation app nurtures a lead to a predefined score or convert Lead to an Opportunity when the lead becomes qualified.

FrontRunner helps sales development teams to convert leads received from the marketing team into qualified leads to pass over to the sales team. The result is a more effective sales development team, a sales team that wastes less time on poorly qualified leads and a better customer experience.



Companies define their ideal customer profile and qualification criteria in FrontRunner, enabling sales development and business development representatives to have a dialogue with a prospect to determine the level of fit between the prospect's needs and the products/services offered by the business.

FrontRunner provides a repeatable, scalable workflow that can be measured and improved to support performance management, on-boarding, coaching, demonstrable team ROI and more accurate pipelines and forecasts.

2 Introduction

This installation guide assumes that you are using Salesforce Professional, Enterprise or Unlimited Editions. The steps to be undertaken to install Kraytix FrontRunner are:

1. Install Kraytix FrontRunner
2. Add the Scorecards Related List
3. Add Scorecards Inline Pages (Optional for Salesforce Classic)
4. Add Scorecards Component (Optional for Salesforce Lightning Experience)
5. Configure User Access
6. Install Sample Data (Optional)
7. Verify Correct Installation

3 Step 1: Install Kraytix FrontRunner

This section will guide you through the steps required to install Kraytix FrontRunner into your Salesforce organisation.



Note: For more information about installing Salesforce applications, including required user permissions, please refer to the Salesforce documentation at: <https://developer.salesforce.com/docs/atlas.en-us.appExchangeInstallGuide.meta/appExchangeInstallGuide/>



Note: This installation guide assumes that you have enabled 'Enhanced Profile User Interface' in your Salesforce org. For instructions on how to enable this feature, please refer to the Salesforce documentation at: https://help.salesforce.com/HTViewHelpDoc?id=users_profiles_about_enhanced_ui.htm

3.1 Getting the App

This section describes how you can gain access to the app for installation.

3.1.1 From AppExchange

Kraytix FrontRunner can be installed into your Salesforce org as a free 30-day trial by clicking the **Get It Now** button on the AppExchange® listing at:

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000DvLDWUA3>

3.1.2 Using an Installation URL

Versions of FrontRunner that are not yet listed on AppExchange are sometimes made available to customers by sending them an installation URL, normally by email. This is often

done to provide selected customers access to new app functionality before the app becomes generally available on AppExchange.

To begin the installation, copy the installation URL into your web browser's address bar and press **Enter**. This will take you to the Salesforce login screen.

3.2 Installing the App

After clicking **Get It Now** and following the AppExchange instructions, or by copying the installation URL into your web browser and pressing **Enter**, you will be presented with the Salesforce login screen.

To progress with the installation, you must login with System Administrator credentials. After entering your credentials, you will be presented with the following screen. Accept the default option of **Install for Admins Only** as it allows users with the System Administrator profile to access the app and to assign app permissions to other users and therefore provides the most flexibility. Click the **Install** button.

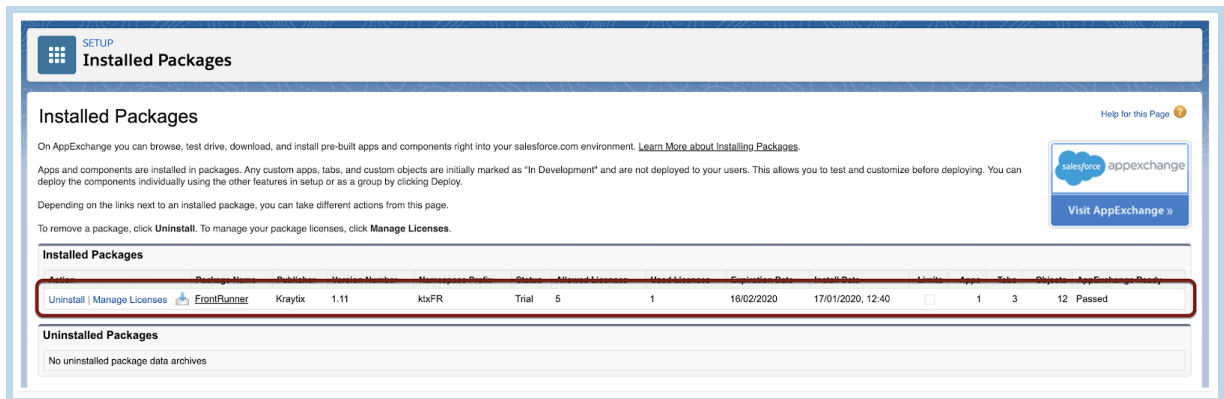
App Name	Publisher	Version Name	Version Number
FrontRunner - Lead Qualification Scorecards for Salesforce*	Kraytix	Version 1.11	1.11

Description
FrontRunner is a 100% native Salesforce* app that helps sales development teams consistently generate higher quality leads. It uses a structured approach to lead qualification to build a more accurate pipeline, improve close rates and increase revenue.

When the **Installation Complete** page is displayed, click the **Done** button. You will now see the **Installed Packages** page with FrontRunner installed.

If the installation takes a long time, the **This app is taking a long time to install** page will be displayed and you will receive an email when installation is complete.

When you receive the email, from **Setup** enter **Installed Packages** in the **Quick Find** box, then select **Installed Packages**. You will now see the **Installed Packages** page with FrontRunner installed.

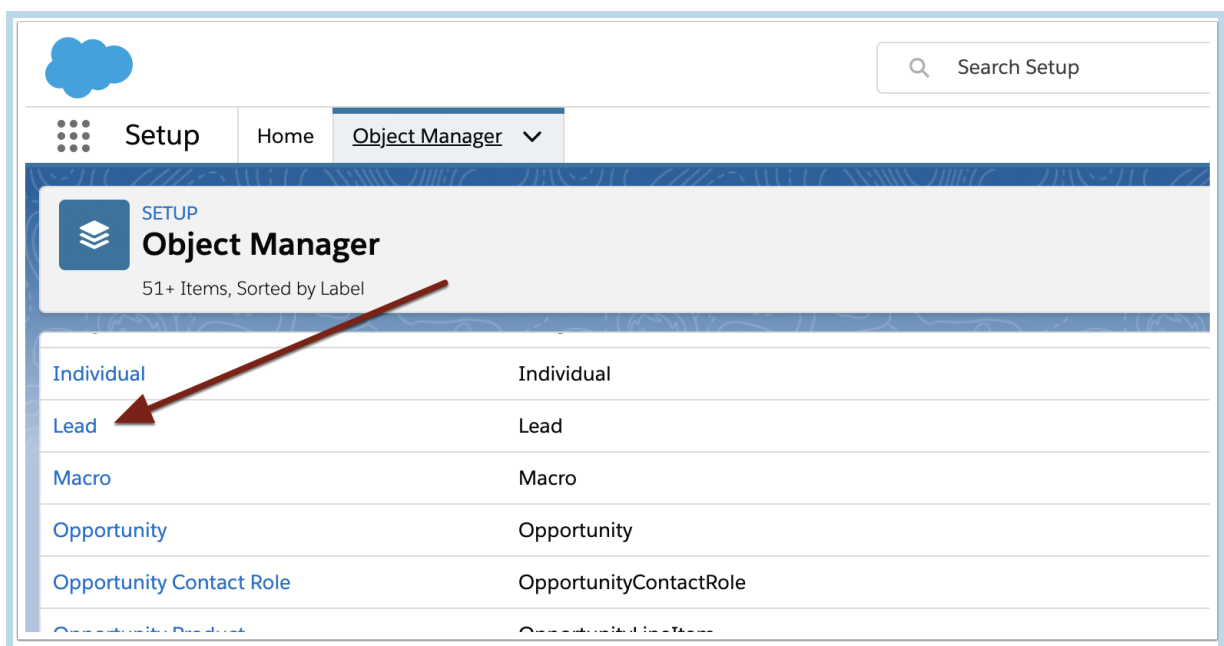


You have now installed FrontRunner. The following sections will show you how to configure FrontRunner for FrontRunner Administrators and FrontRunner Users.

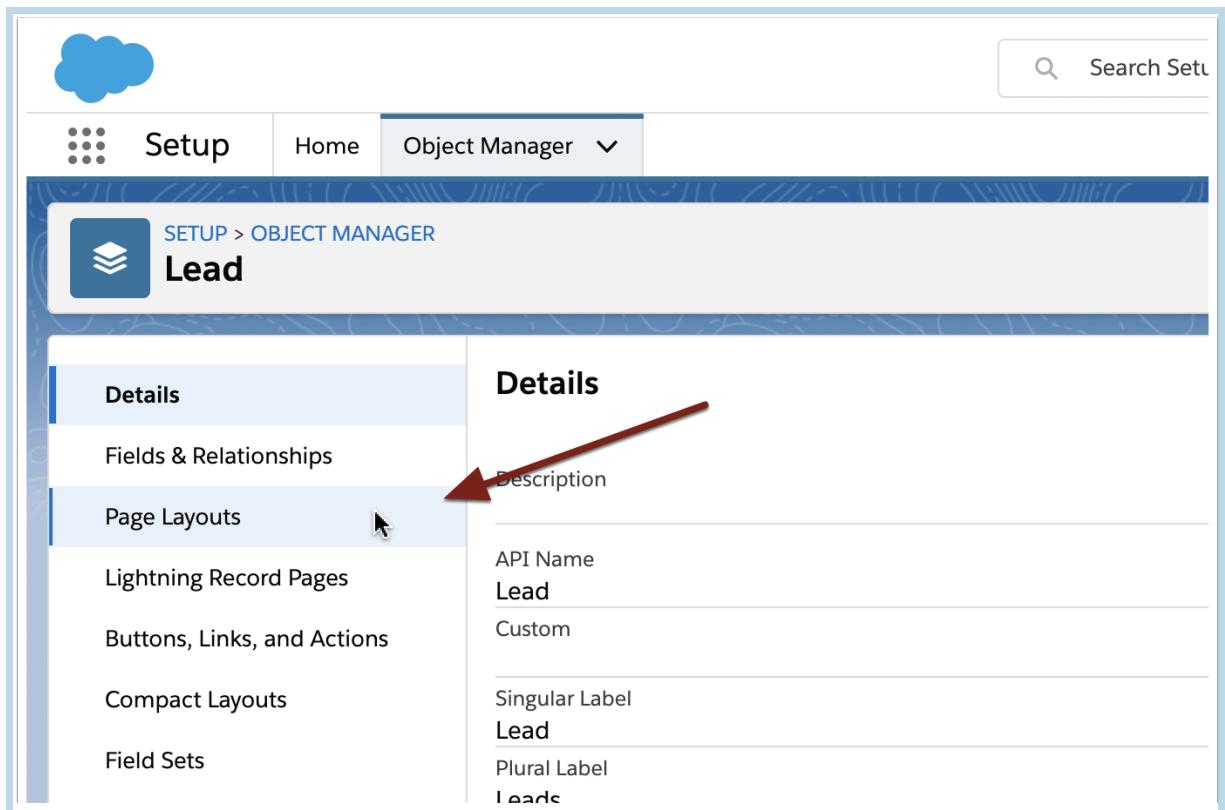
4 Step 2: Add the Scorecards Related List

This step adds the Scorecards related list to the Lead and Opportunity standard objects' page layout. This allows users to easily attach Scorecards to Leads and Opportunities and it allows them to navigate to Scorecards that have been attached to Leads and Opportunities.

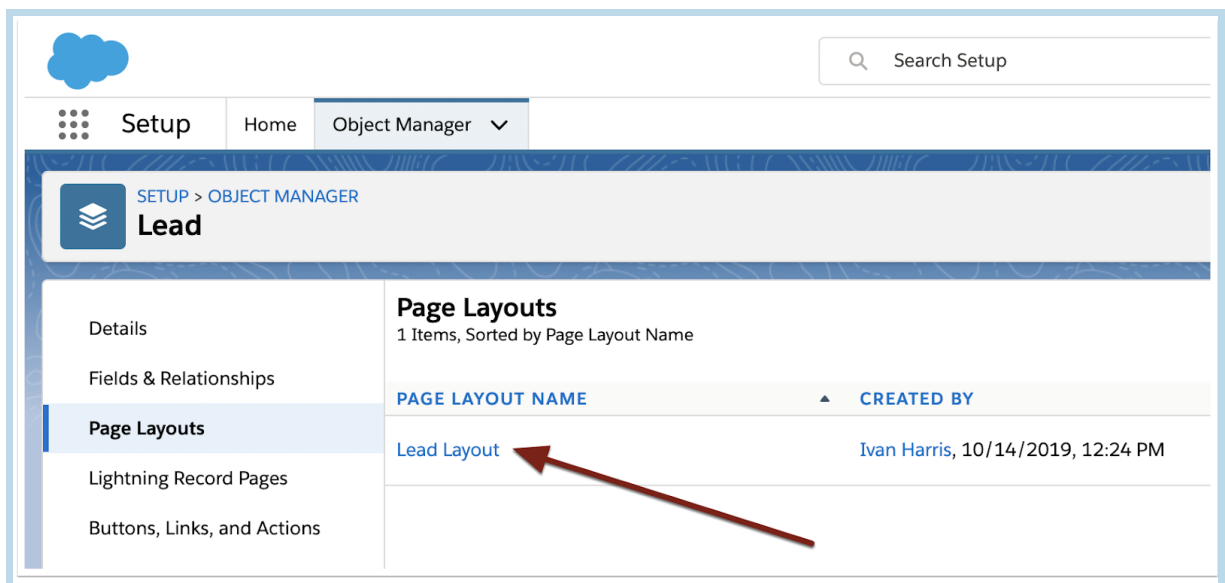
From **Setup** enter **Object Manager** in the **Quick Find** box, then click on **Object Manager**. Scroll down and click on **Lead**.



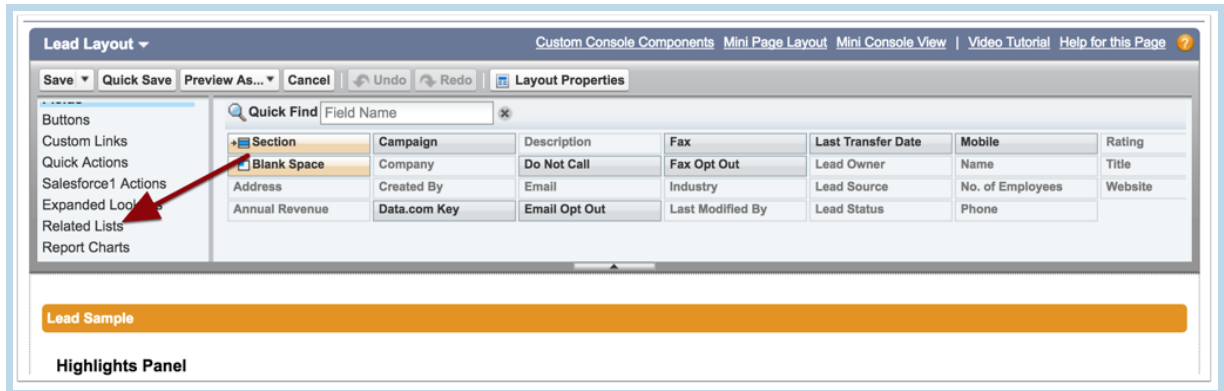
From the displayed options, click on **Page Layouts**.



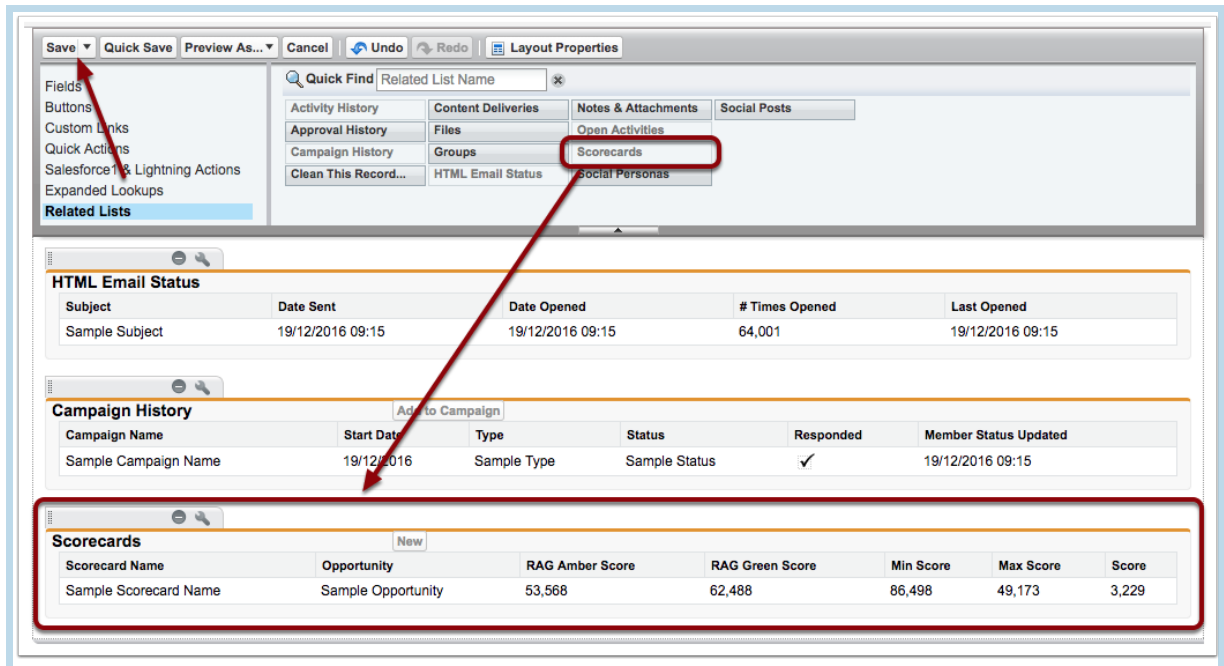
Then click on the page layout that you wish to add the related list to.



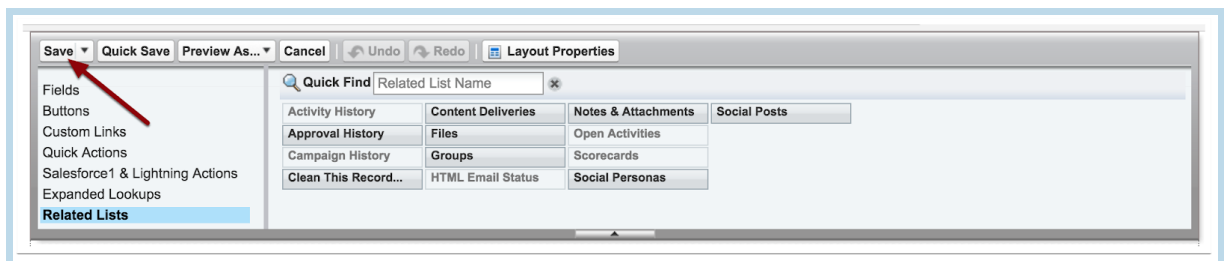
Select the **Related Lists** item from the **Lead Layout** category list.



From the set of available related lists, select **Scorecards** and drag and drop to position the related list in the page layout. If positioned at the end of the related lists in the page layout, the result should look like the following.



Click the **Save** button. You will be asked whether or not users' personal related list customizations should be overwritten. Click the **Yes** button to ensure that the new related list is visible to all users. Users can customize their related lists again should they wish to.



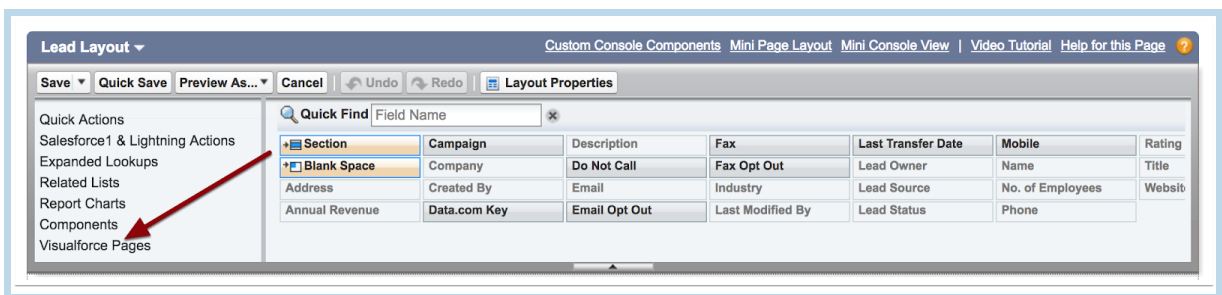
Repeat the above steps for the Opportunity page layout.

5 Step 3: Add Scorecards Inline Pages (Optional for Salesforce Classic)

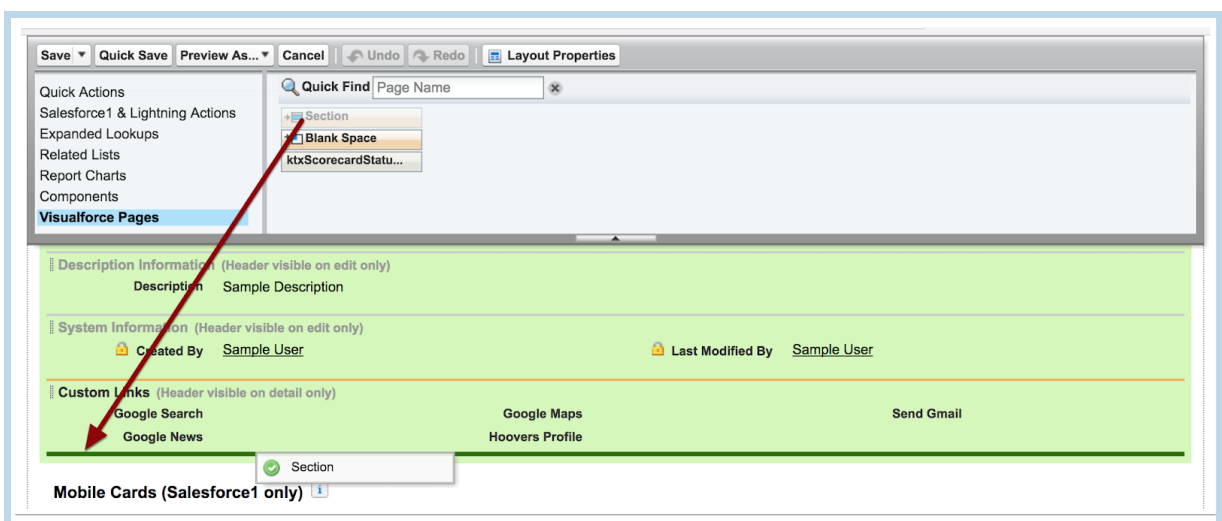
This optional step adds the Scorecards inline page to the Lead and Opportunity standard objects' page layout. This improves user productivity by allowing them to view and update Scorecards directly from a Lead or Opportunity's detail page rather than having to navigate to the Scorecard first.

This option is most useful for Salesforce Classic. For Salesforce Lightning Experience we recommend using Lightning App Builder to add a component to your Lead and Opportunity record pages (see Step 4).

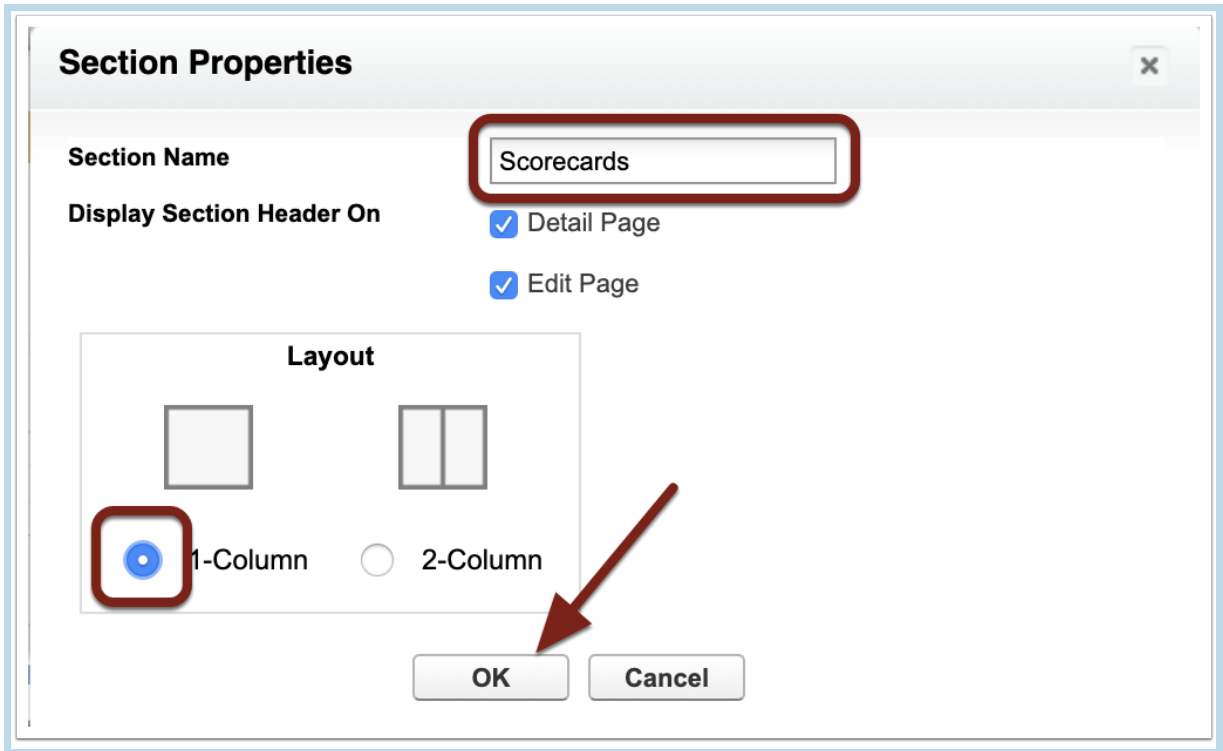
Return to the Page Layout editor for the Lead standard object that was used in Step 2 above, then select the **Visualforce Pages** item from the **Lead Layout** category list.



Create a new section on the Page Layout by dragging the **Section** item to where you would like the inline page to be located.

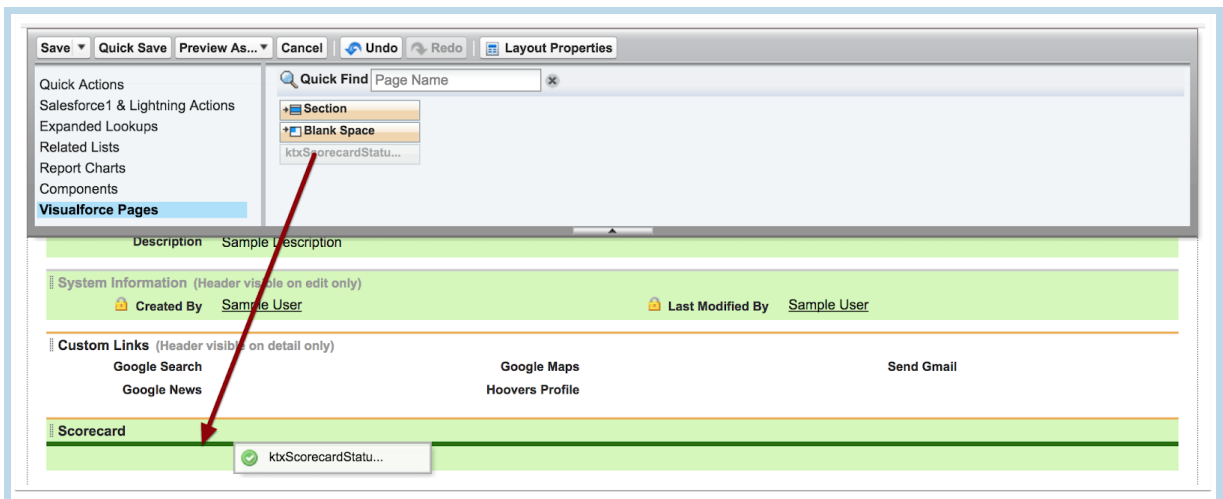


In the **Section Properties** page, enter **Scorecards** for the **Section Name** and select the **1-Column** layout, then click the **OK** button.



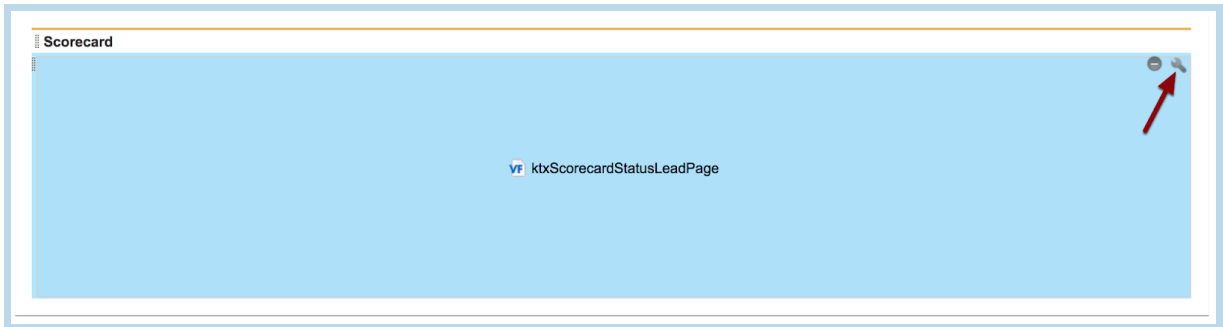
The screenshot shows the **Section Properties** dialog box. The **Section Name** field is set to **Scorecards**. The **Display Section Header On** section has both **Detail Page** and **Edit Page** checked. In the **Layout** section, the **1-Column** radio button is selected. A red box highlights the **1-Column** radio button, and a red arrow points to the **OK** button.

Now drag the **ktxScorecardStatusLeadPage** to the new section.

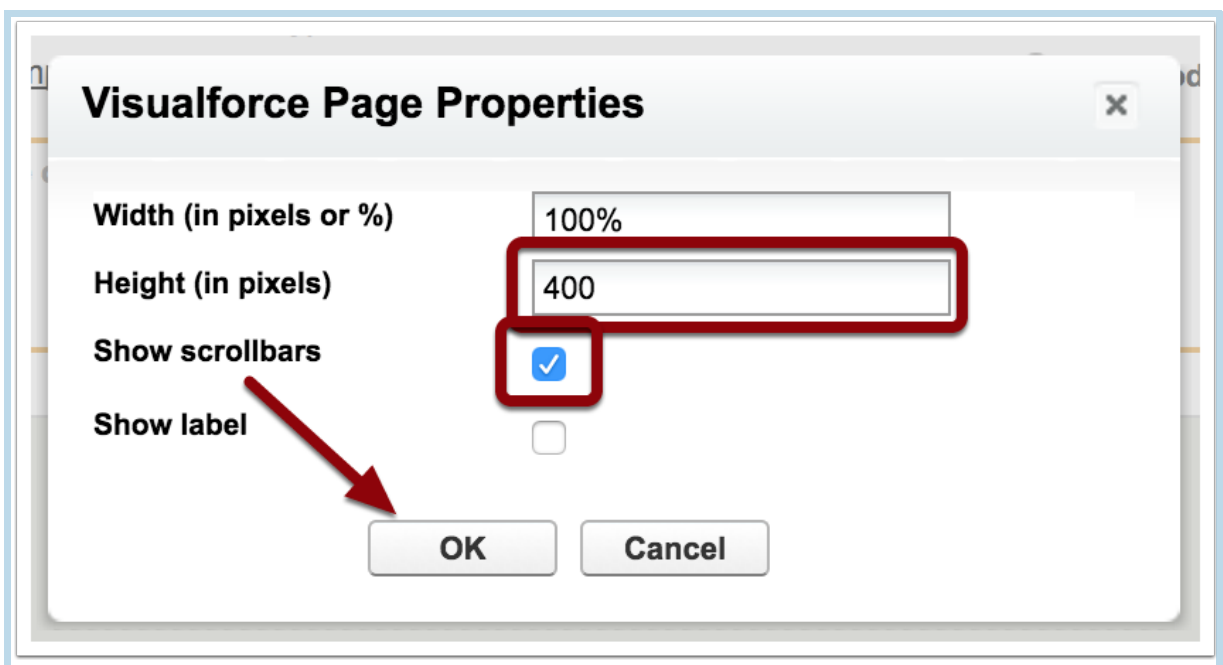


The screenshot shows the Visualforce Page editor. The **Quick Find** search bar is set to **Page Name**. The **Visualforce Pages** section is expanded, showing a list of components. The **ktxScorecardStatusLeadPage** component is highlighted. A red arrow points from the component name in the list to the **Scorecard** section on the page.

Click the **wrench icon** in the top right hand corner of the Visualforce page placeholder.

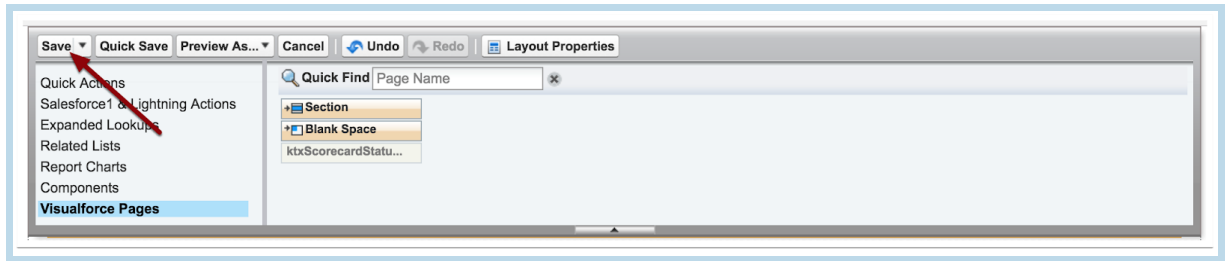


In the **Visualforce Page Properties** page, set the **Height (in pixels)** to 400 and select **Show scrollbars**. Then click the **OK** button.



Note: Setting the Height (in pixels) property to 400 is only a guide. The height that you will use depends on the height of the Scorecards that you create. Complex Scorecards with many Categories and Criteria will require more height. Simple Scorecards with few Categories and Criteria will require less height. Once you have created your Scorecards you may want to revisit this setting and tailor it accordingly. Setting the Show scrollbars option ensures that your users can always scroll the Scorecard if the height is less than the height of the Scorecard.

Click the **Save** button.

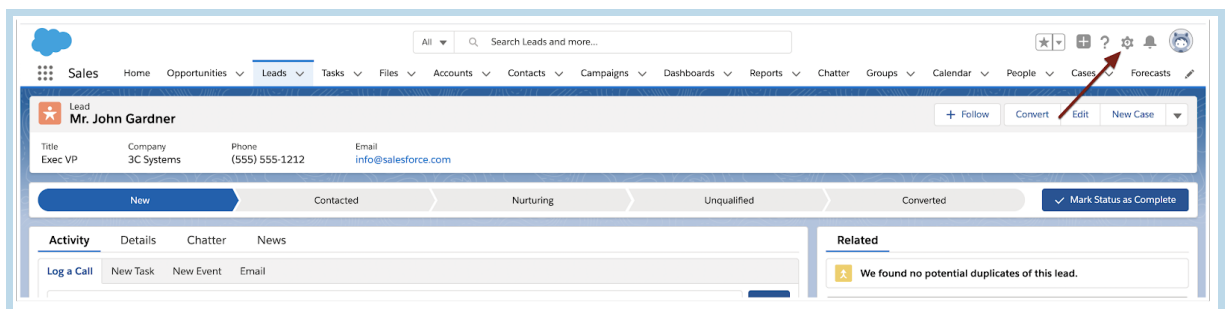


Repeat the above steps for the Opportunity page layout.

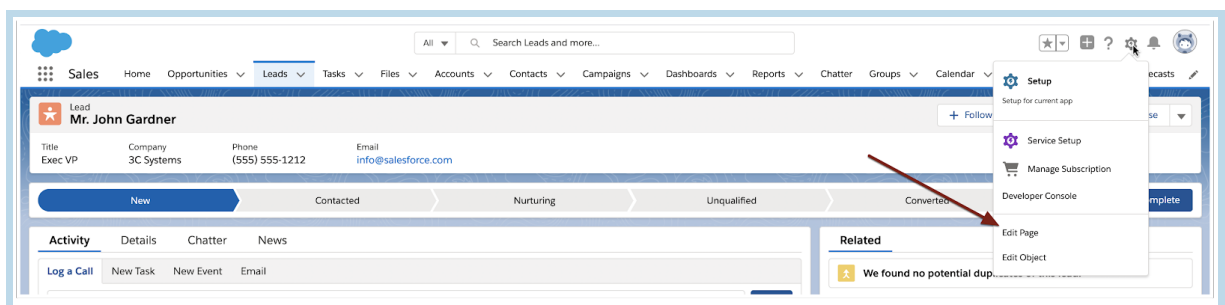
6 Step 4: Add Scorecards Component (Optional for Salesforce Lightning Experience)

This optional step uses Lightning App Builder to add a Visualforce page component to your Lead and Opportunity record pages. The component will display FrontRunner Scorecards to increase user productivity as they can view and edit Scorecards without having to navigate away from the Lead or Opportunity record.

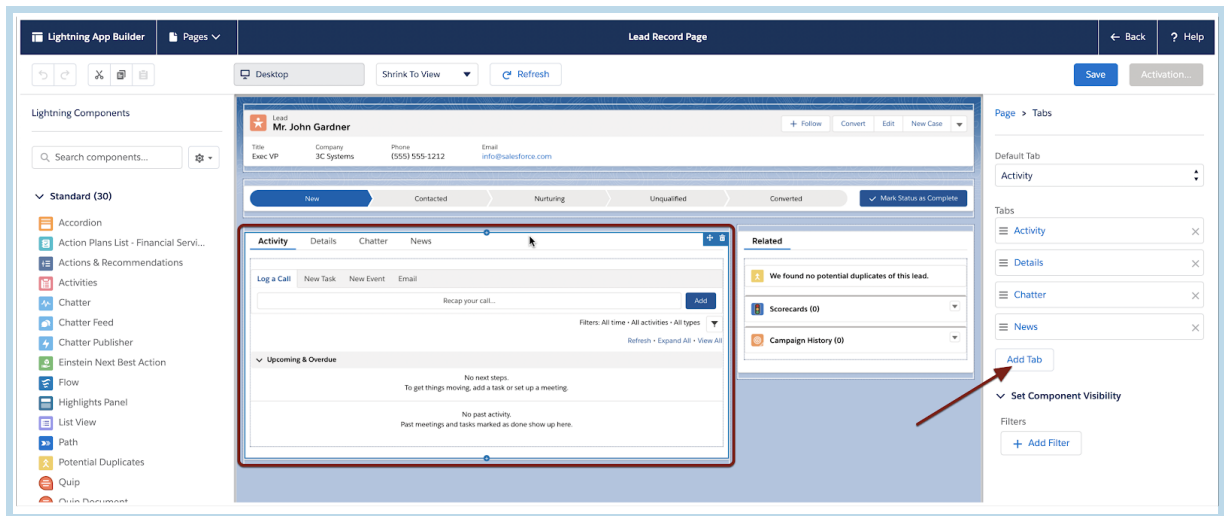
Navigate to any Lead record, then click the **Setup** icon.



From the **Setup** menu click the **Edit Page** menu item.

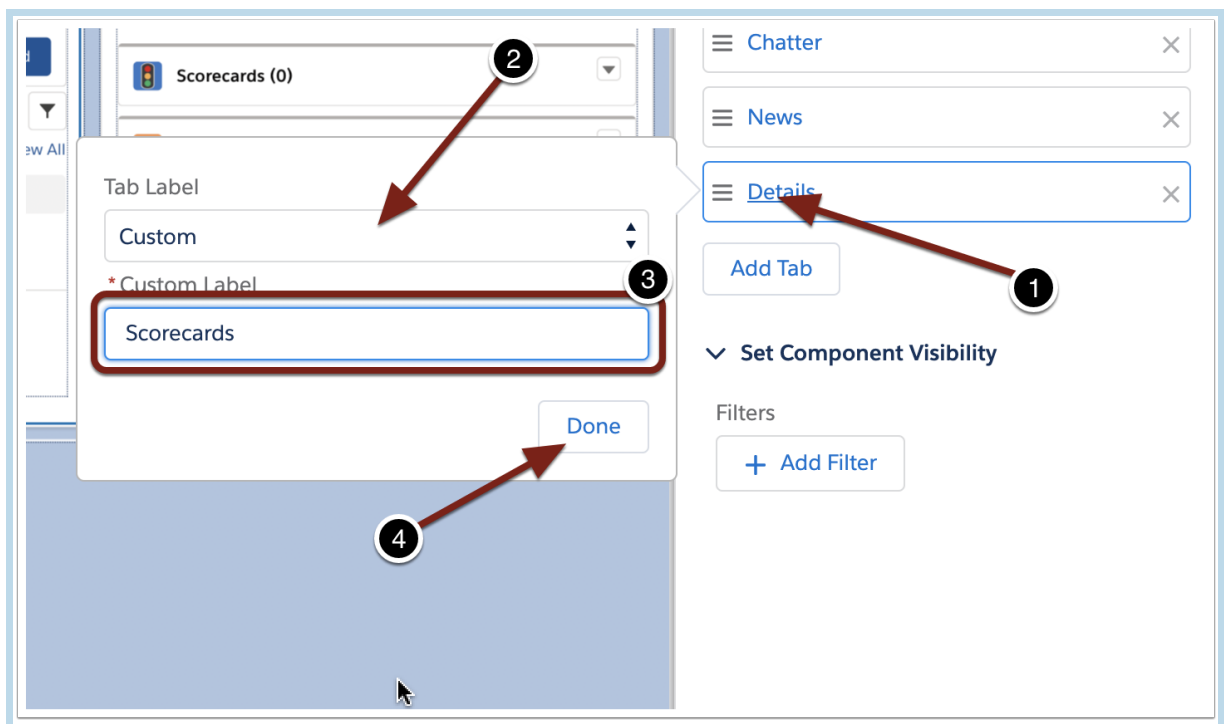


Select the tabs component that is already on the record page and then click the **Add Tab** button.



Perform the following steps:

1. Click the newly added tab, which will be called *Details*.
2. For the **Tab Label** select **Custom**.
3. For **Custom Label** enter **Scorecards**.
4. Click **Done**.



Now perform the following steps:

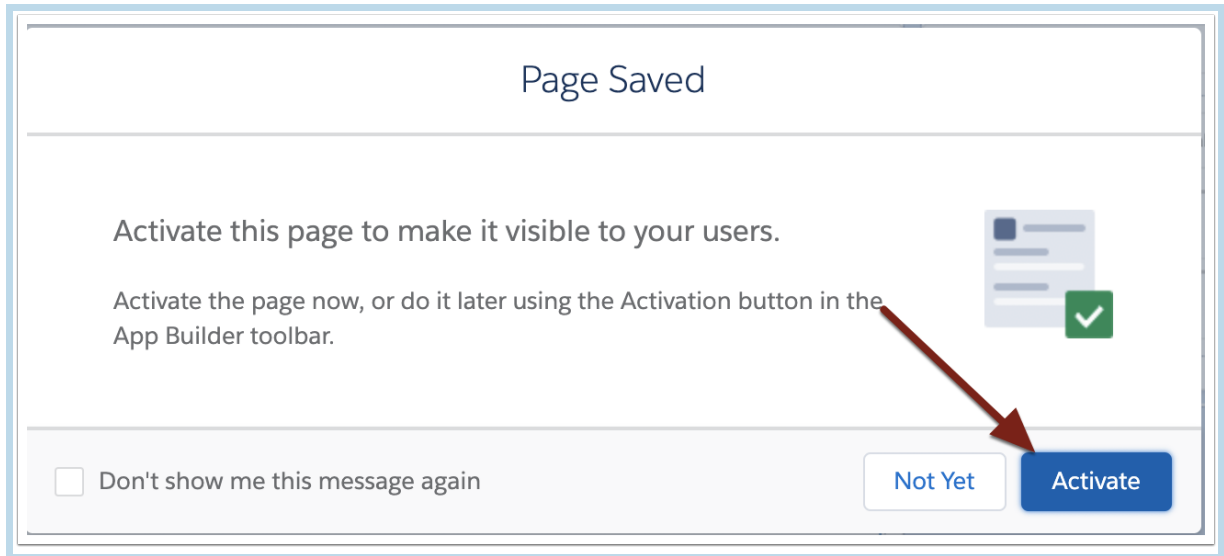
1. Click the newly added **Scorecards** tab.
2. Drag the **Visualforce** component onto the tab area.
3. Deselect **Show Label**.
4. For **Height (in pixels)** type 600.
5. Click **Save**.



Note: Setting the Height (in pixels) property to 600 is only a guide. The height that you will use depends on the height of the Scorecards that you create. Complex Scorecards with many Categories and Criteria will require more height. Simple Scorecards with few Categories and Criteria will require less height. Once you have created your Scorecards you may want to revisit this setting and tailor it accordingly.

The screenshot shows the Lightning App Builder interface for a 'Lead Record Page'. The main canvas displays a lead record for 'Mr. Andy Smith' with tabs for 'Activity', 'Details', 'Chatter', 'News', and 'Scorecards'. The 'Scorecards' tab is selected, and a 'Visualforce' component is being added to it. The 'Lightning Components' panel on the left shows the 'Visualforce' component being dragged onto the 'Scorecards' tab. The 'Properties' panel on the right shows the configuration for the 'Visualforce' component. The 'Show Label' checkbox is unchecked, and the 'Height (in pixels)' is set to 600. The 'Visualforce Page Name' is set to 'ktxScorecardStatusLeadPage'. The 'Set Component Visibility' section shows filters.

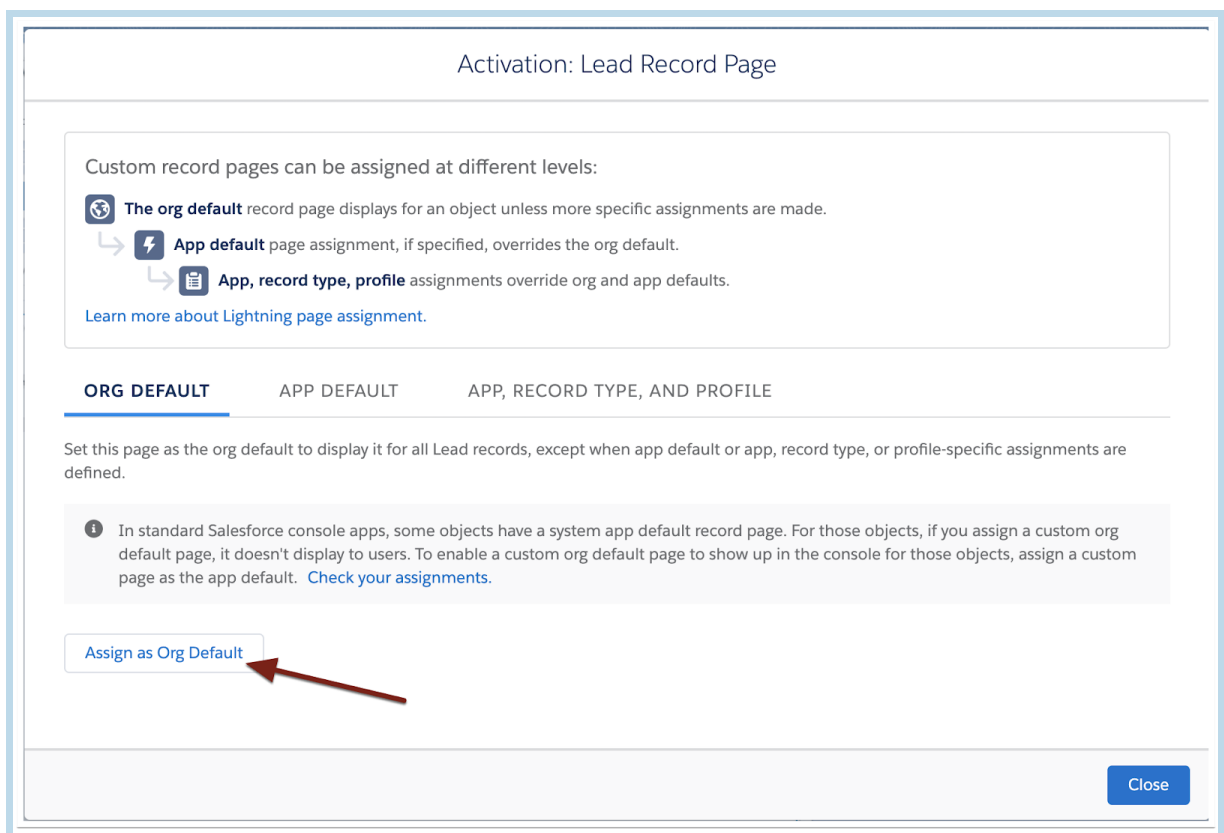
Click **Activate** to activate the page.



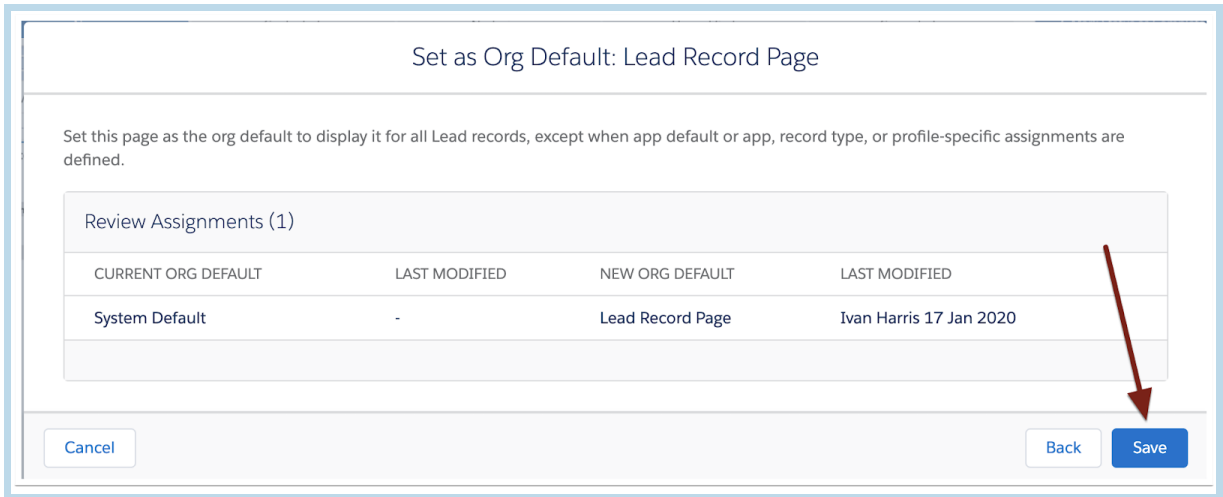
Decide who in your business should have access to the new record page. For this Installation Guide we will make the page an Org Default. Click **Assign as Org Default**.



Note: For further information on using Lightning App Builder and activation options for Lightning Experience Record Pages, please refer to the Salesforce documentation at: https://help.salesforce.com/articleView?id=lightning_app_builder_overview.htm



Click **Save**.



Set as Org Default: Lead Record Page

Set this page as the org default to display it for all Lead records, except when app default or app, record type, or profile-specific assignments are defined.

Review Assignments (1)			
CURRENT ORG DEFAULT	LAST MODIFIED	NEW ORG DEFAULT	LAST MODIFIED
System Default	-	Lead Record Page	Ivan Harris 17 Jan 2020

Buttons: Cancel, Back, Save (highlighted with a red arrow)

Exit Lightning App Builder by clicking the **Back** link.



Navigation bar: ← Back, ? Help

Buttons: Save, Activation...

Breadcrumbs: Page > Visualforce

7 Step 5: Configure User Access

Now that FrontRunner is installed, you need to modify the permissions for the users that you want to give app access to.

7.1 Types of FrontRunner Users

FrontRunner supports two types of user:

FrontRunner User: Allows users to create Scorecards from Template Scorecards, attach those Scorecards to either a Lead or Opportunity and create Snapshot Scorecards that show how Scorecards have changed over time.

FrontRunner Administrator: In addition to everything that a FrontRunner User can do, a FrontRunner Administrator can create a library of Template Scorecards that users can create

Scorecards from. Unlike a FrontRunner User, a FrontRunner Administrator can also delete Snapshot Scorecards.

7.2 FrontRunner Permission Sets

To simplify the setting up of permissions for users and to enable them to use the app, FrontRunner includes two permission sets that mirror the user types described above. To view these permission sets: from **Setup**, enter **Permission** in the **Quick Find** box, then select **Permission Sets**. The FrontRunner Administrator and FrontRunner User permission sets will be displayed as follows.

The screenshot shows the 'Permission Sets' page in Salesforce Setup. The page title is 'Permission Sets' with a 'Help for this Page' link. Below the title, there is a description: 'On this page you can create, view, and manage permission sets. In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)'.

Below the description, there is a 'New' button and a 'Create New View' link. A table of permission sets is displayed, with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The 'FrontRunner Administrator' and 'FrontRunner User' permission sets are highlighted with a red box.

Action	Permission Set Label	Description	License
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
Clone	Einstein Analytics Platform Admin	Create and customize Einstein Analytics apps, dashboards, datasets and data flows.	Analytics Platform
Clone	Einstein Analytics Platform User	View Einstein Analytics apps and dashboards.	Analytics Platform
Clone	Einstein Analytics for Sales Cloud	View and manage Einstein Analytics for Sales Cloud	Analytics Template Administration
Clone	FrontRunner Administrator		Salesforce
Clone	FrontRunner User		Salesforce
Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User

7.3 Create the App Assignment Permission Set

Permission sets installed with managed packages do not include the assignment of apps, such as FrontRunner, so you will need to create a new permission set that allows you to assign the FrontRunner app to users so that it appears in their App Launcher. Click the **New** button to create a new permission set.

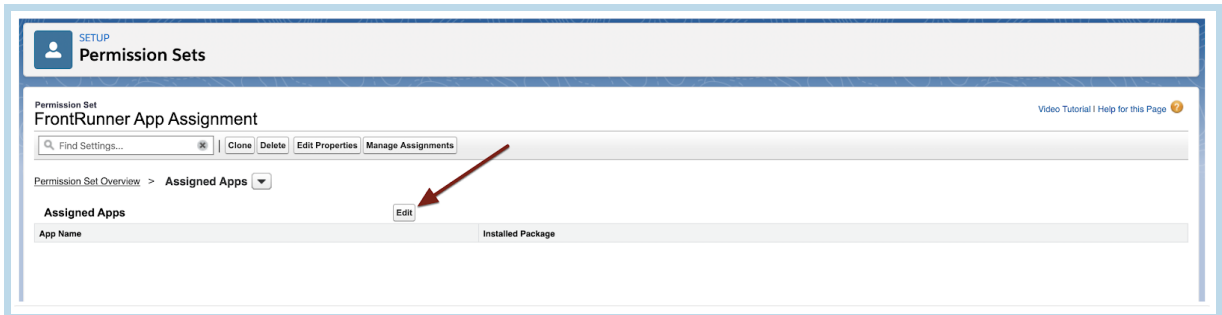
The screenshot shows the 'Permission Sets' page in Salesforce Setup. The 'New' button is highlighted with a red arrow. The page content is identical to the previous screenshot, showing the 'Permission Sets' table.

Enter the following information in the **Create Permission Set** page, then click the **Save** button:

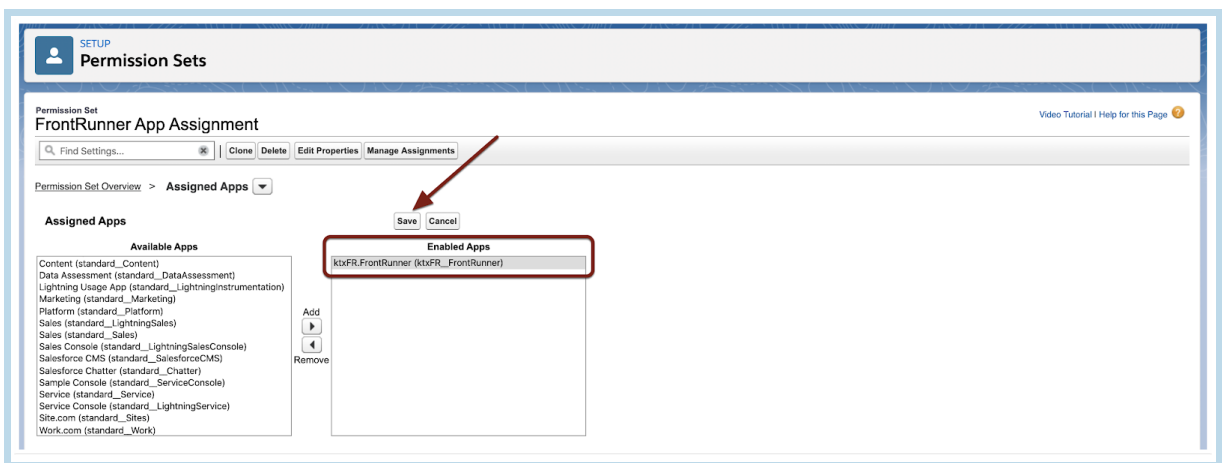
Field	Value
Label	FrontRunner App Assignment
API Name	Keep the auto populated value
User License	Salesforce

The FrontRunner App Assignment permission set will be displayed next. Click the **Assigned Apps** link.

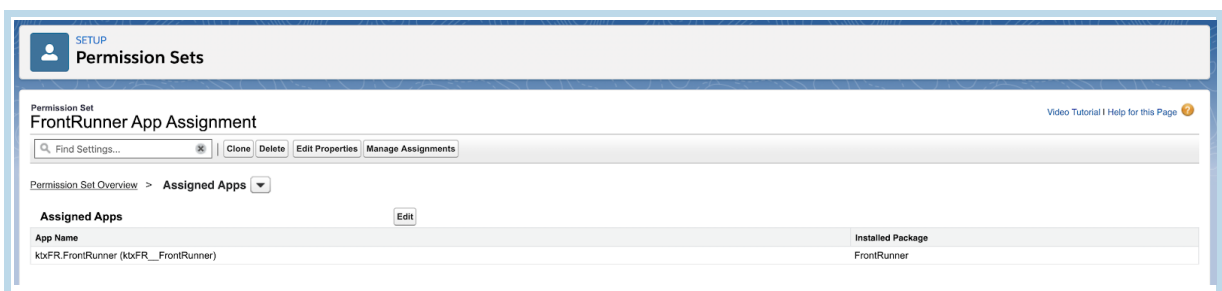
On the **Assigned Apps** page, click the **Edit** button.



In the resulting screen, move `ktxFR.FrontRunner` from the list of **Available Apps** to the list of **Enabled Apps**, then click the **Save** button.



The displayed screen should look like the following:



All the permission sets needed to configure user access to the FrontRunner app have now been created. Now the permission sets need to be assigned to users.

7.4 Assigning Permission Sets to Users

Now the permission sets can be assigned to users to give them access to the FrontRunner app. For the purposes of this guide, two fictitious users have been created, both using the Salesforce license type and the Standard User profile:

Elvira Curro: Elvira will be a FrontRunner Administrator so that she can build the library of Template Scorecards in addition to creating and managing Scorecards and Snapshot Scorecards herself. She will have the FrontRunner Administrator and FrontRunner App Assignment permission sets assigned to her.

Jim Brown: Jim will be a FrontRunner User so he won't be able to create Template Scorecards. He will have the FrontRunner User and FrontRunner App Assignment permission sets assigned to him so that he can create Scorecards from Template Scorecards and attach them to Lead and Opportunity records.

To view users: from **Setup**, enter **Users** in the **Quick Find** box, then select **Users**. Click on **Elvira Curro's** username link to view her detail page.

SETUP Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: [All Users](#) | [Create New User](#)

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile
Edit Login	Brown, Jim	jbrw	Zq7895ce-96ab-4f6b-8b19-g2118b07981d@kraytix.com	14/01/2020, 13:59		✓	Standard User
Edit	Chatter Expert	Chatter	chattiv.00d4f000000024nuae.cu4rcbiloxf@chatter.salesforce.com			✓	Chatter Free User
Edit Login	Curro, Elvira	ecurr	50913dfa-4971-4952-8359-84535b04ce41@kraytix.com			✓	Standard User
Edit	Harris, Ivan	lharr	ivan.harris.demo3@kraytix.com	17/01/2020, 12:26		✓	System Administrator

Scroll down to the **Permission Set Assignments** related list, which should look like the following. Click the **Edit Assignments** button.

SETUP Users

Created By: [Ivan Harris](#), 17/01/2020, 14:41

Individual

Modified By: [Elvira Curro](#), 17/01/2020, 14:42

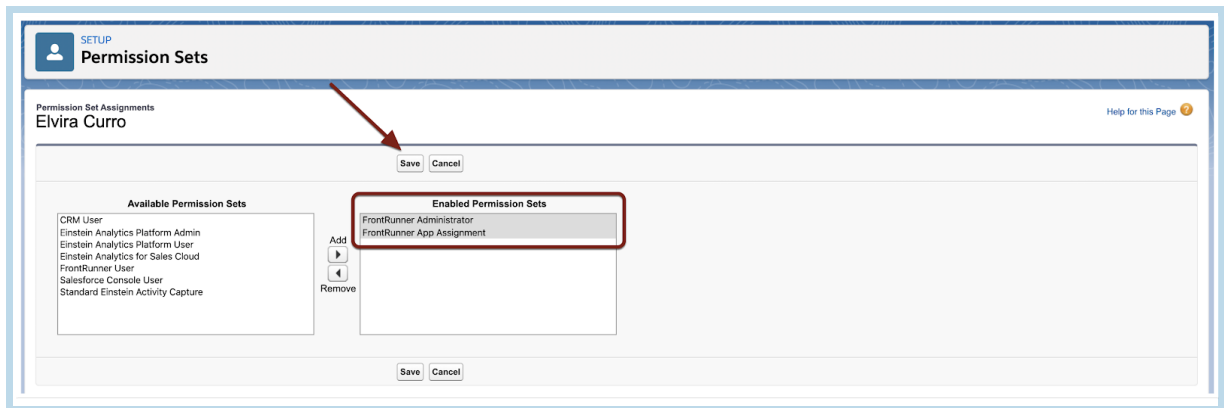
[Edit](#) | [Sharing](#) | [Reset Password](#) | [Login](#) | [Freeze](#)

Permission Set Assignments [Edit Assignments](#) [Permission Set Assignments Help](#)

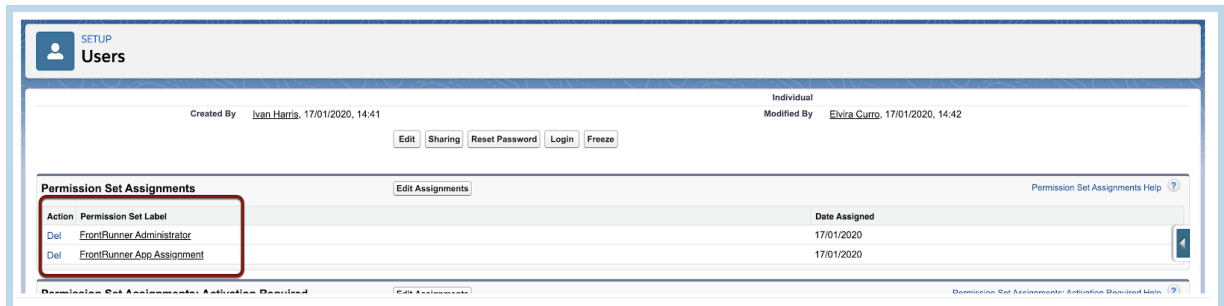
No records to display

Permission Set Assignments: Activation Required [Edit Assignments](#) [Permission Set Assignments: Activation Required Help](#)

Move the *FrontRunner App Assignment* and *FrontRunner Administrator* permission sets from the **Available Permission Sets** to the **Enabled Permission Sets** list and click the **Save** button.



The resulting permission set assignment should look like the following:



Repeat the process for the Jim Brown user; however, assign the permission sets *FrontRunner App Assignment* and *FrontRunner User*.

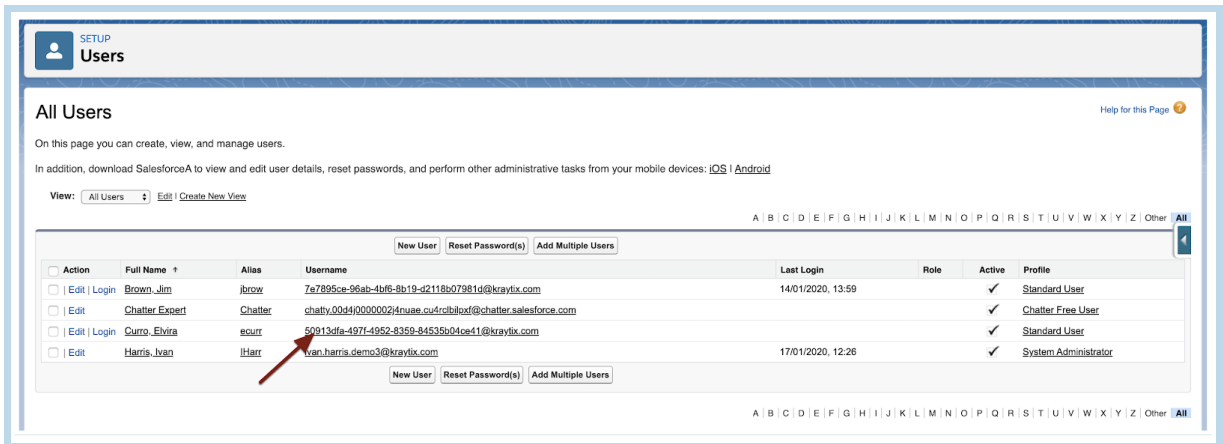


Note: Permission set assignments can be added and removed for multiple users in one go. Refer to the Salesforce documentation at: https://help.salesforce.com/HTViewHelpDoc?id=perm_sets_mass_assign.htm

7.5 Assigning Licenses to Users

You will have a number of licenses available to assign to users, either because you are using the 30-day free trial, which includes 5 licenses, or because you have purchased licenses.

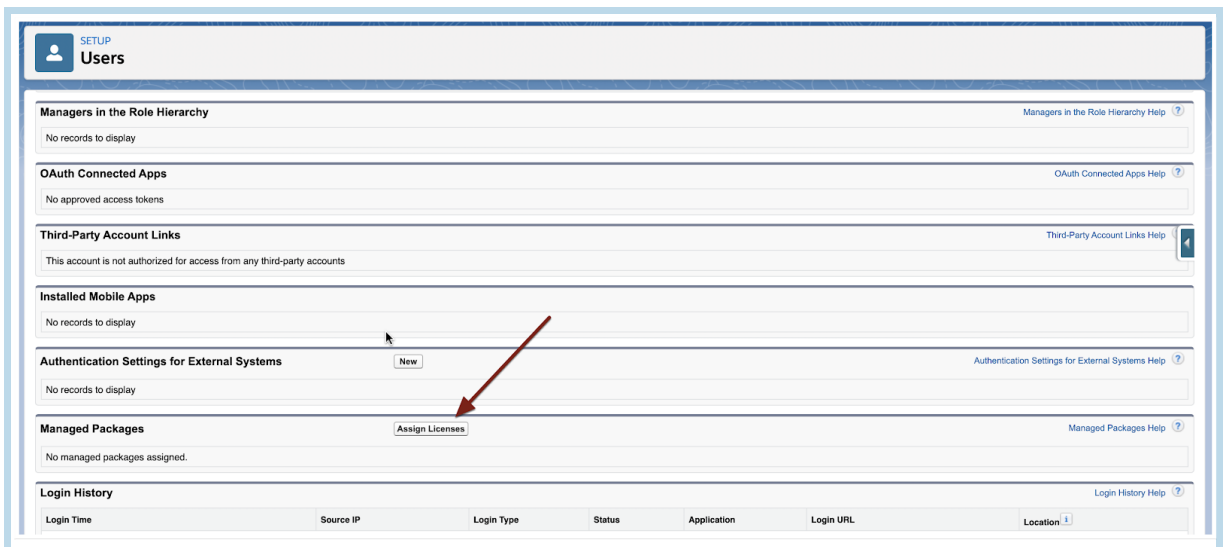
To view users: from **Setup**, enter **Users** in the **Quick Find** box, then select **Users**. Click on **Elvira Curro**'s username link to view her detail page.



The screenshot shows the 'All Users' page in Salesforce Setup. It includes a table of users with columns for Action, Full Name, Alias, Username, Last Login, Role, Active, and Profile. The user 'Elvira Curro' is highlighted with a red arrow. Below the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

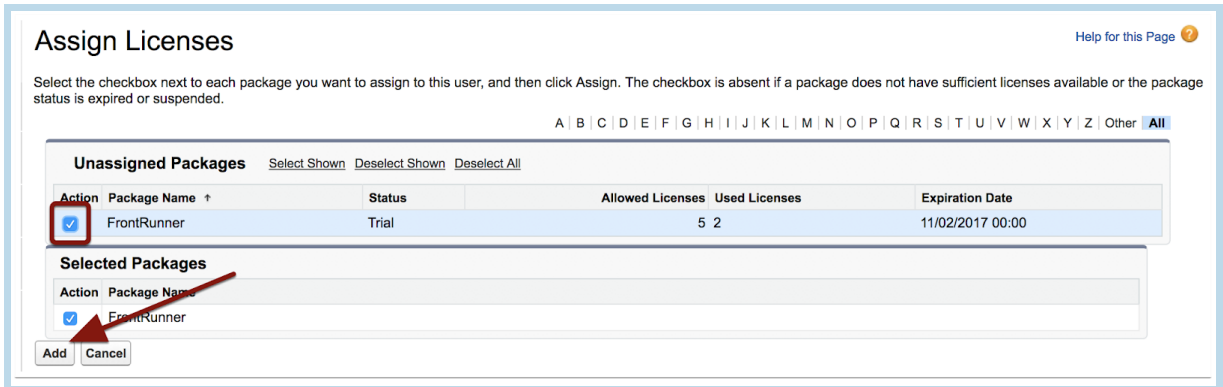
Action	Full Name	Alias	Username	Last Login	Role	Active	Profile
Edit Login	Brown, Jim	jibrow	7e7895ce-96ab-4b65-8b19-d2118b07981d@kraytix.com	14/01/2020, 13:59		✓	Standard User
Edit	Chatter Expert	Chatter	chatty.00d4d00000024nuae.cu4rcblt0xf@chatter.salesforce.com			✓	Chatter Free User
Edit Login	Curro, Elvira	ecurro	50913dffa-4971-4962-8359-84535b04ce41@kraytix.com			✓	Standard User
Edit	Harris, Ivan	IHarris	ivan.harris.demo3@kraytix.com	17/01/2020, 12:26		✓	System Administrator

Scroll down to the **Managed Packages** related list, which should look like the following. Click the **Assign Licenses** button:



The screenshot shows the 'Users' page in Salesforce Setup. It includes several related lists: 'Managers in the Role Hierarchy', 'OAuth Connected Apps', 'Third-Party Account Links', 'Installed Mobile Apps', 'Authentication Settings for External Systems', 'Managed Packages', and 'Login History'. The 'Managed Packages' section is highlighted with a red arrow pointing to the 'Assign Licenses' button.

Select *FrontRunner* from the **Unassigned Packages** list, which will add it to the **Selected Packages** list, and click the **Add** button.



Assign Licenses [Help for this Page](#)

Select the checkbox next to each package you want to assign to this user, and then click Assign. The checkbox is absent if a package does not have sufficient licenses available or the package status is expired or suspended.

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Unassigned Packages					
Action	Package Name	Status	Allowed Licenses	Used Licenses	Expiration Date
☒	FrontRunner	Trial	5	2	11/02/2017 00:00

Selected Packages	
Action	Package Name
☒	FrontRunner

Add **Cancel**

Repeat the process for the Jim Brown user.

8 Step 6: Install Sample Data (Optional)

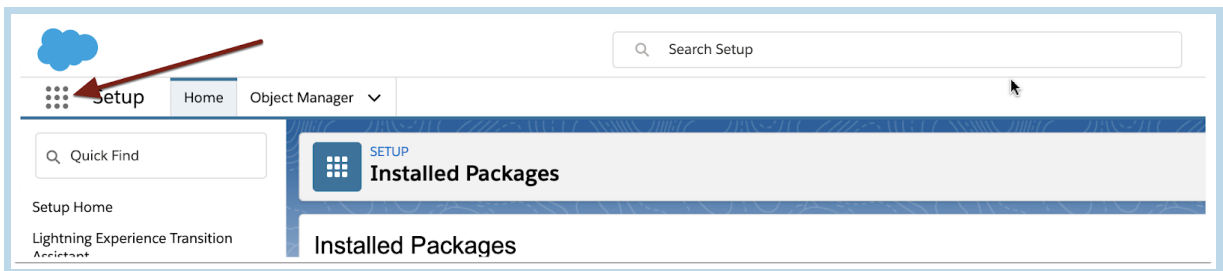
To help you get started as quickly as possible, FrontRunner includes sample Template Scorecards and sample Scorecard data that can be installed as follows. Note that this step is optional; however, if you choose not to install sample data, there will be no Template Scorecards installed and you will have to create your own Template Scorecards from scratch.



Note: To learn how to create Template Scorecards from scratch, please refer to the *Kraytix FrontRunner - Administration Guide*, which can be found on the Kraytix website (<http://www.kraytix.com/>) or on the Kraytix FrontRunner Salesforce® AppExchange® listing (<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000DvLDWUA3>).

Installing sample data also simplifies the installation verification in Step 7.

Open the App Launcher by clicking the  icon on the left side of the navigation bar.



 **Setup** Home Object Manager

Search Setup

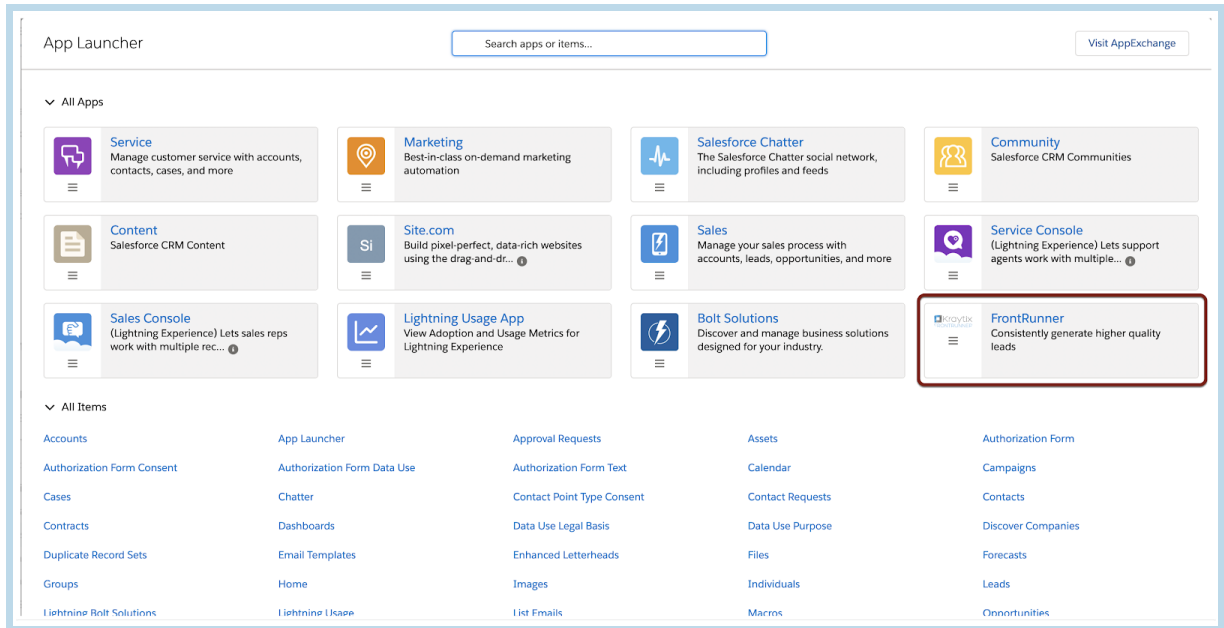
Quick Find

Setup Home
Lightning Experience Transition Assistant

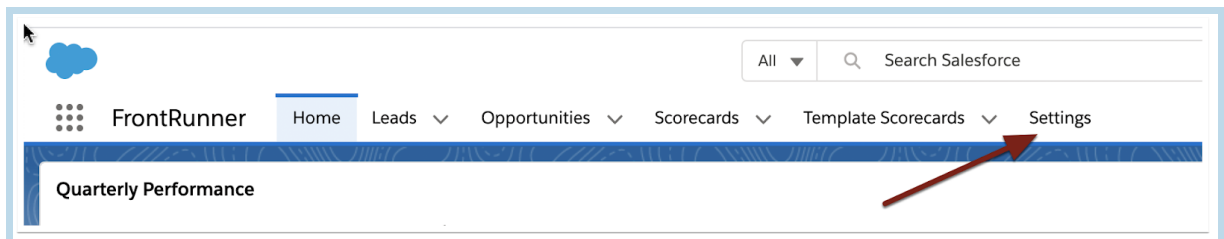
Installed Packages

Installed Packages

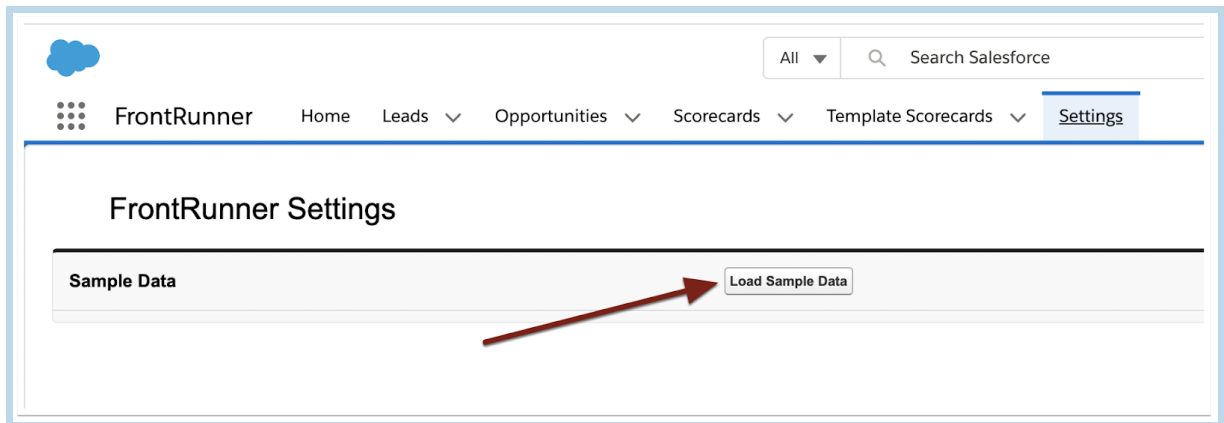
From the **App Launcher** window, click the **FrontRunner** tile.



Your tab layout will change to display the tabs that are part of the FrontRunner app. Click the **Settings** tab.

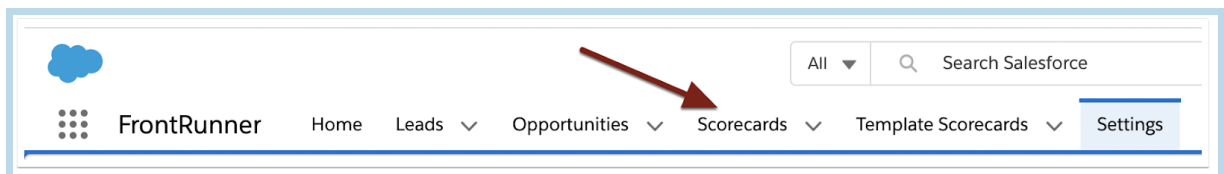


The **FrontRunner Settings** page will be displayed. Click the **Load Sample Data** button.



Warning! Do not click the Load Sample Data button more than once, otherwise duplicate copies of sample data will be loaded.

To validate that the sample data has been loaded, click the **Scorecards** tab.



The Scorecards list view should look similar to the following.

The screenshot shows the 'Scorecards' list view. It features a table with the following columns: 'Scorecard Name', 'Lead', 'Opportunity', 'Score', 'Score Percent', and 'RAG Status'. The table contains five rows of data. Above the table, there's a search bar and several action buttons: 'New', 'Import', and 'Change Owner'. The table is titled 'Recently Viewed' and shows '5 items - Updated a few seconds ago'.

	Scorecard Name	Lead	Opportunity	Score	Score Percent	RAG Status
1	Scorecard: Alan Taylor, Kraytix Shipping	Alan Taylor		16	51.11%	Amber
2	Scorecard: Jane Jones, Kraytix Autosport	Jane Jones		6	40.00%	Red
3	Scorecard: John Smith, Kraytix Telecom	John Smith		0	33.33%	Red
4	Scorecard: Kraytix Aerospace - December Fuel		Kraytix Aerospace - December Fuel	-100	0.00%	Grey
5	Scorecard: Kraytix Aerospace - September Fuel		Kraytix Aerospace - September Fuel	94	64.67%	Amber

9 Step 7: Verify Correct Installation

To verify that Kraytix FrontRunner is correctly installed, the following steps need to be performed.

1. FrontRunner Administrator verification

- Verify Tab Access
- Verify Template Scorecard Create
- Verify Scorecards Related List
- Verify Scorecards Inline Pages (Optional for Salesforce Classic)
- Verify Scorecards Component (Optional for Salesforce Lightning Experience)
- Verify Scorecard Create

2. FrontRunner User verification

- Verify Tab Access
- Verify Scorecards Related List
- Verify Scorecards Inline Pages (Optional for Salesforce Classic)
- Verify Scorecards Component (Optional for Salesforce Lightning Experience)
- Verify Scorecard Create



Note: These verification instructions assume that sample data has been installed.

9.1 FrontRunner Administrator Verification

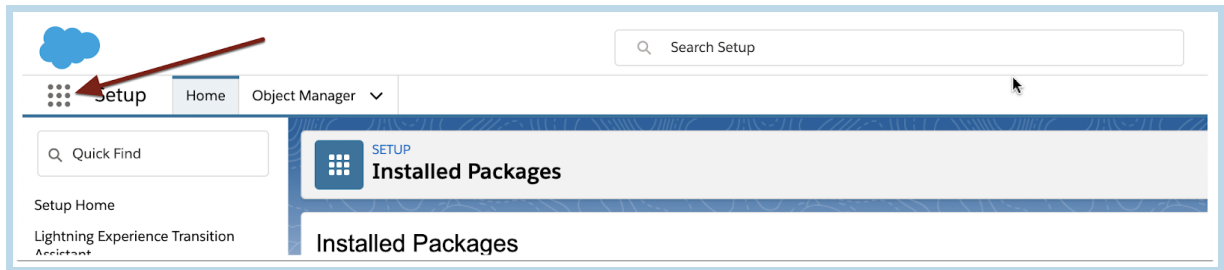
To verify that FrontRunner Administrators have been setup correctly, login to the Elvira Curro user account.



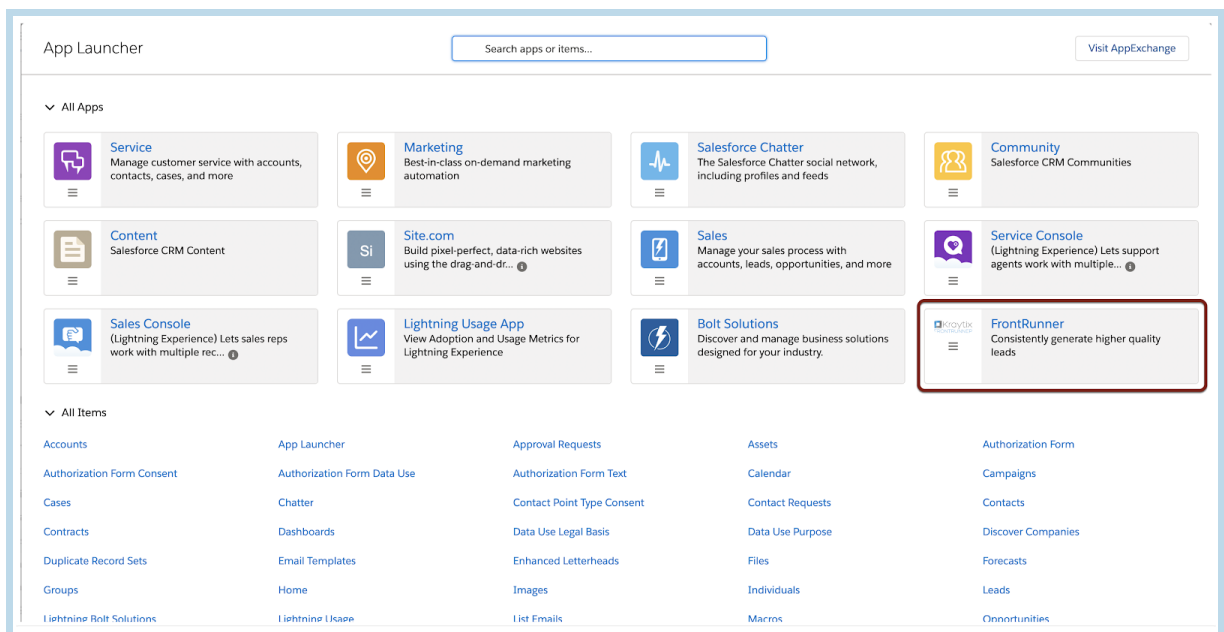
Note: To make it simple for System Administrators to login as different users, Salesforce supports a 'Administrators Can Log in as Any User' feature. For further information, refer to:

<https://help.salesforce.com/apex/HTViewSolution?urlname=Enabling-Organization-Admins-Can-Login-as-Any-User>

Open the App Launcher by clicking the  icon on the left side of the navigation bar.

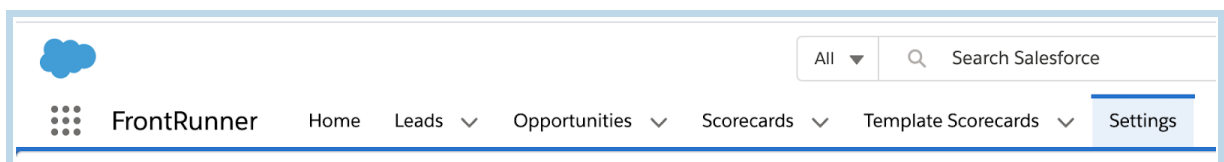


From the **App Launcher**. Click on the **FrontRunner** tile.



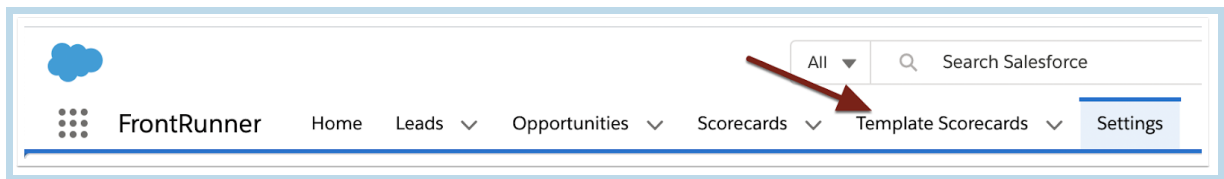
9.1.1 Verify Tab Access

If FrontRunner Administrators have been configured with access to the correct FrontRunner app tabs, the tabs should look like the following:

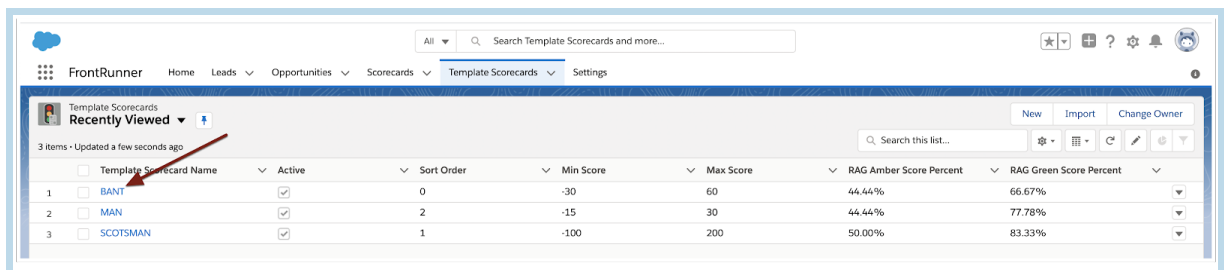


9.1.2 Verify Template Scorecard Create

To verify that FrontRunner Administrators can create new Template Scorecards, click the **Template Scorecards** tab.

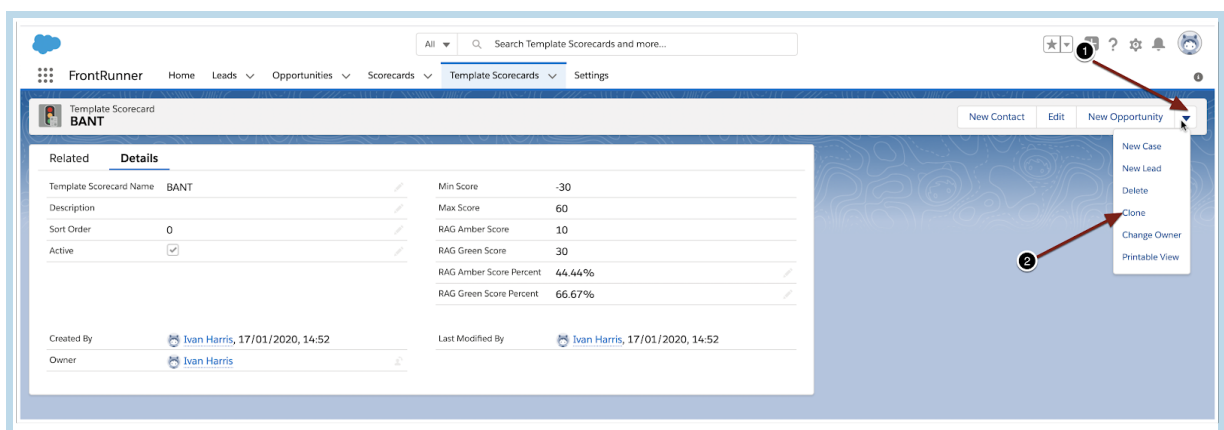


Click the **BANT** Template Scorecard link in the list of Template Scorecards.

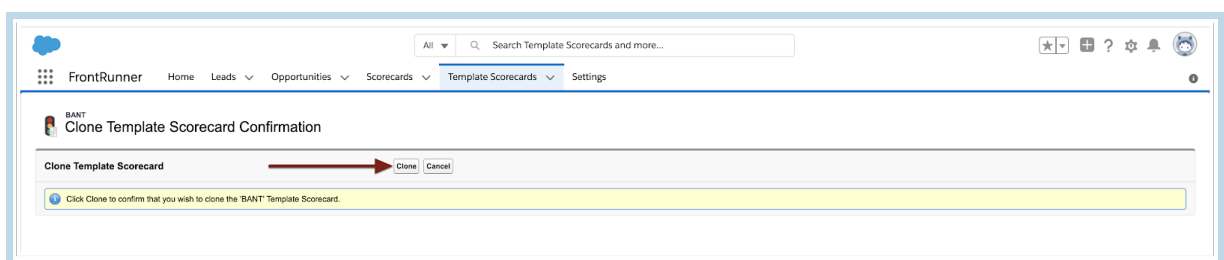


To make a deep copy of the BANT Template Scorecard, perform the following steps:

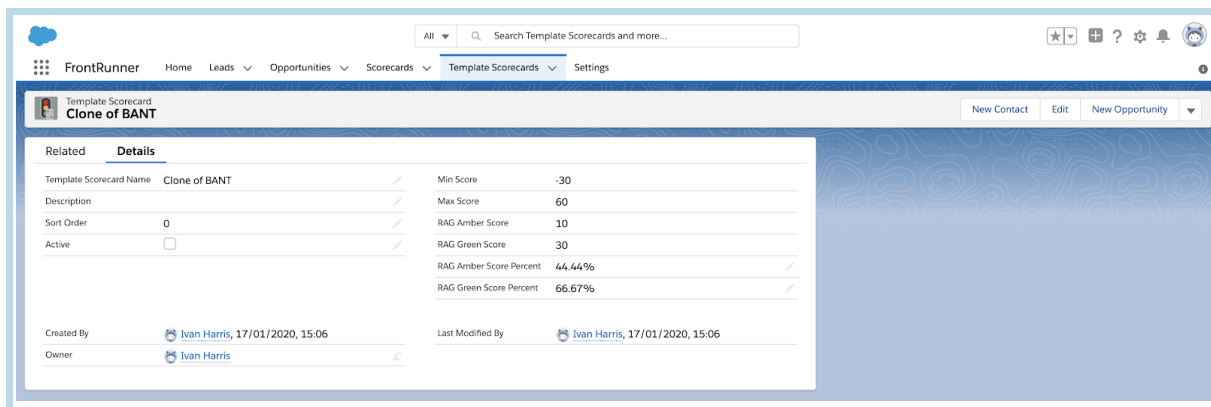
1. Click the **page-level action menu** in the record's highlights panel
2. Click the **clone** button



In the **Clone Template Scorecard Confirmation** page, click the **Clone** button to confirm that you want to clone the BANT Template Scorecard.

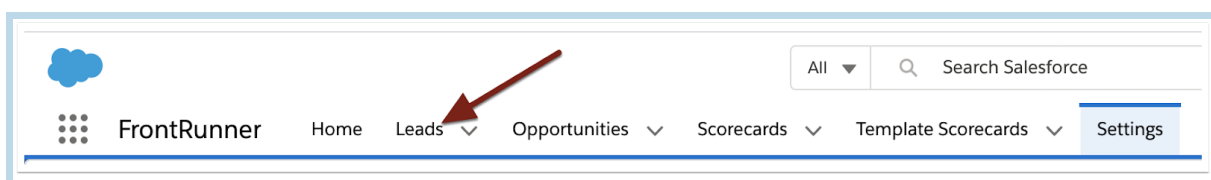


If the following page is displayed without any errors, a FrontRunner Administrator has successfully created a new Template Scorecard:

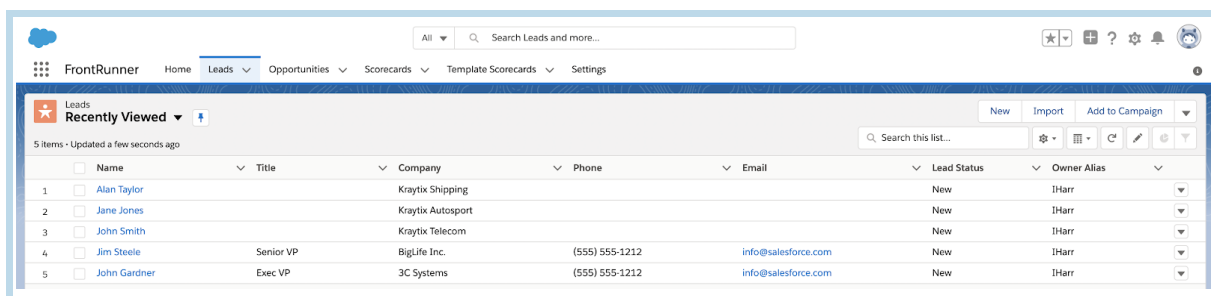


9.1.3 Verify Scorecards Related List

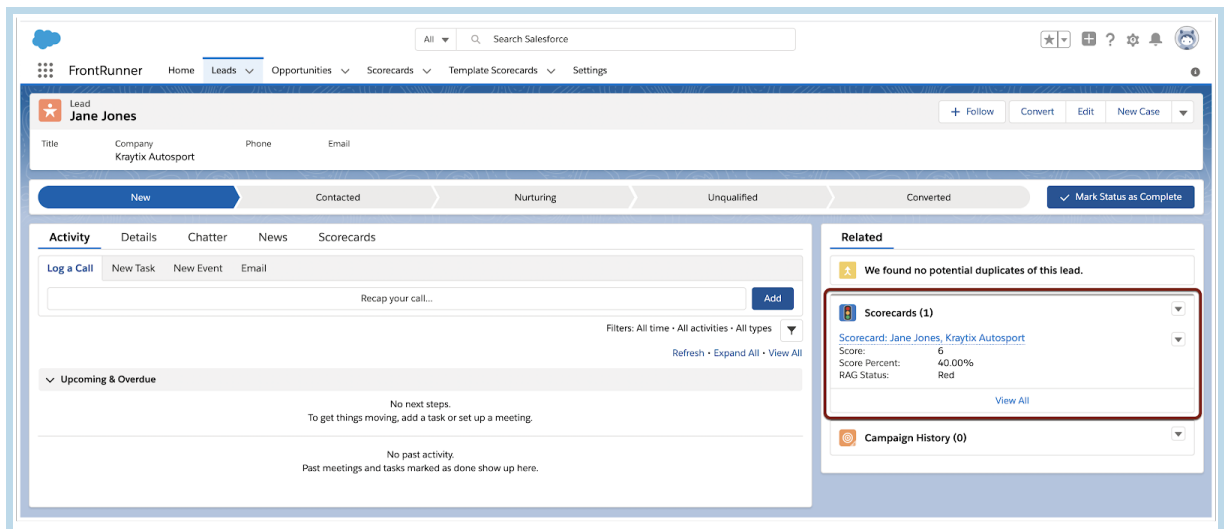
To verify that FrontRunner Administrators can view the Scorecards related list on Lead records, first click the **Leads** tab.



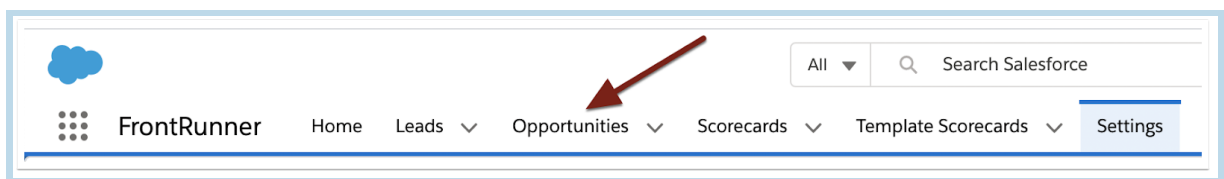
In the resulting Leads list view page, click on any Lead.



The Scorecards related list should be visible as highlighted in the following screenshot:

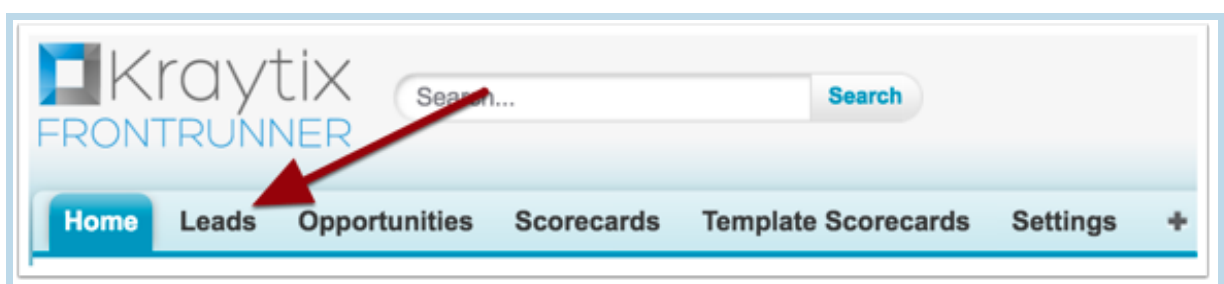


Repeat the above steps to verify that FrontRunner Administrators can view the Scorecards related list on Opportunity records. Start by clicking the **Opportunities** tab.

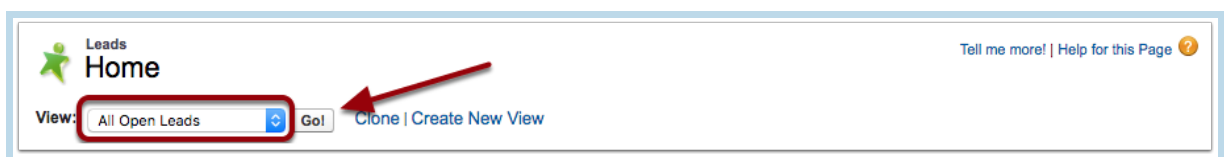


9.1.4 Verify Scorecards Inline Pages (Optional for Salesforce Classic)

This verification is performed using Salesforce Classic. To verify that FrontRunner Administrators can view the Scorecards inline page on Lead records, first click the **Leads** tab.



If *All Open Leads* is already selected in the **view** picklist, click the **Go** button; otherwise select **All Open Leads** in the **view** picklist.



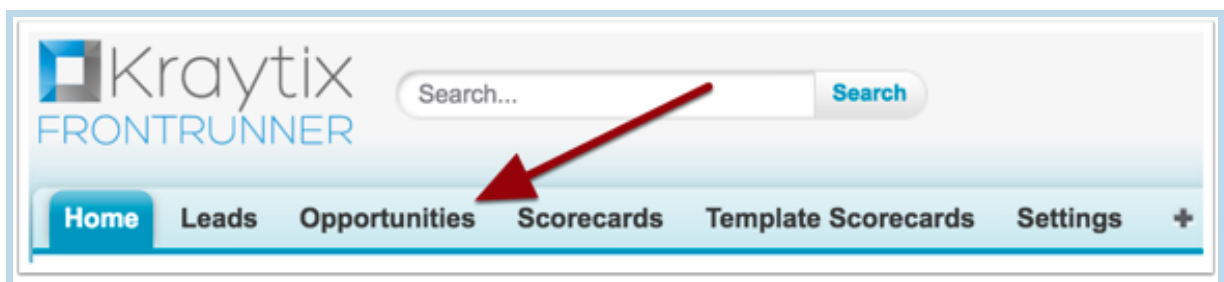
In the resulting Leads list view page, click on the **Alan Taylor** Lead.

Action	Name	Company	State/Province	Phone	Email	Lead Status	Owner Alias	Created
Edit Del +	Gardner, John	3C Systems	Massachusetts	(555) 555-1212	info@salesforce.com	Open	SBowe	07/
Edit Del +	Jones, Jane	Kraytix Autosport				Open	SBowe	19/
Edit Del +	Loehr, Sarah	MedLife, Inc.	New York	(555) 555-1212	info@salesforce.com	Contacted	SBowe	07/
Edit Del +	Smith, Andy	Universal Technolo...	Connecticut	(555) 555-1212	info@salesforce.com	Open	SBowe	07/
Edit Del +	Smith, John	Kraytix Telecom				Open	SBowe	19/
Edit Del +	Steele, Jim	BigLife Inc.	Connecticut	(555) 555-1212	info@salesforce.com	Open	SBowe	07/
Edit Del +	Taylor, Alan	Kraytix Shipping				Open	SBowe	19/

The Scorecards inline page, highlighted in the following screenshot, should be visible.

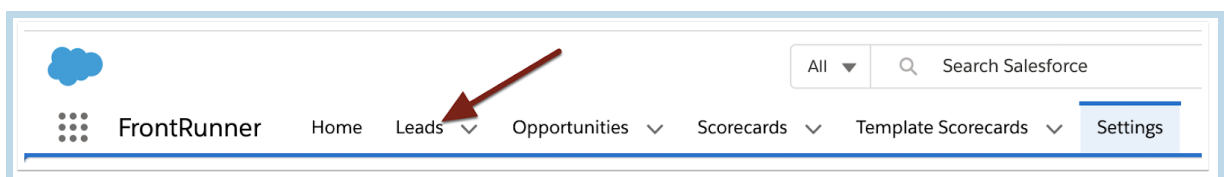
Category Name	Criterion Name	Criterion Outcome	Criterion Score	Week - 1	Week - 2	Week - 3	Week - 4
Budget	Does the customer have a budget for this opportunity?	There is a budget pool that multiple projects are competing for	67%		67%		
	Is the budget sufficient to procure our solution?	The budget is insufficient to procure our solution, but the opp is must win	80%		80%		
Authority	Is the customer's authorisation process understood?	The customer's procurement cycle and milestones are partially understood	60%		60%		
	Do we know who has the authority to make the purchase?	We have a good relationship with the budget holder	100%		100%		
Need	Do we know why the customer needs to make this purchase?		0%		0%		
Timeframe	Is the customer's buying timeline understood?	The customer will not share the buying timelines with us	0%		0%		
Scorecard Score:			51%		51%		

Repeat the above steps to verify that FrontRunner Administrators can view the Scorecards inline page on Opportunity records. Start by clicking the **Opportunities** tab.

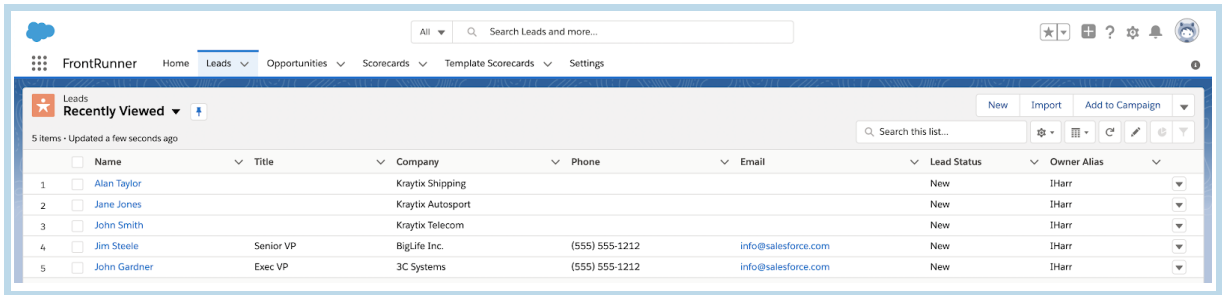


9.1.5 Verify Scorecards Component (Optional for Salesforce Lightning Experience)

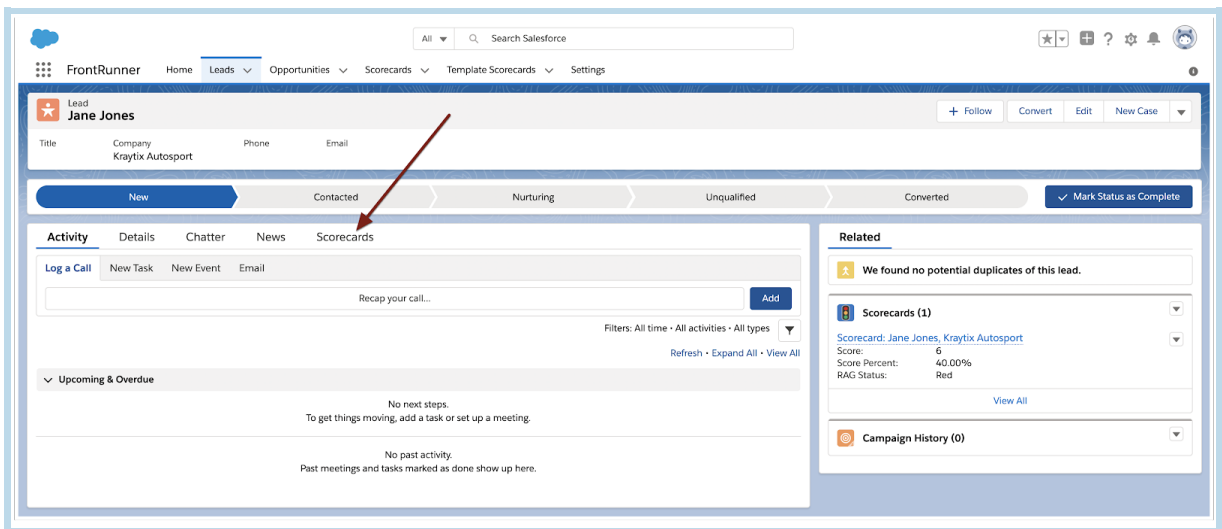
To verify that FrontRunner Administrators can view the Scorecards Component on a Lead's record page, first click the **Leads** tab.



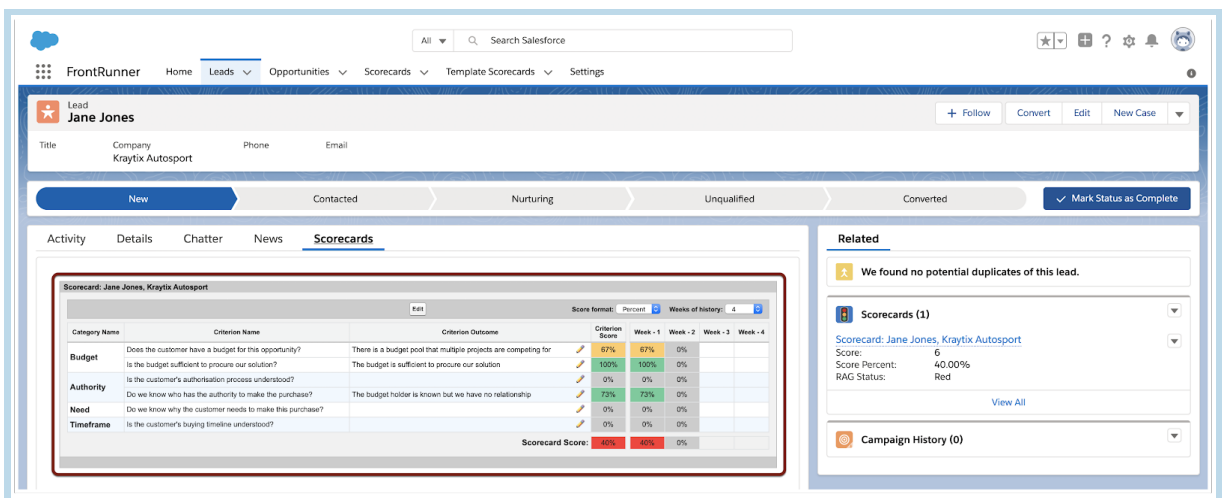
In the resulting Leads list view page, click on any Lead.



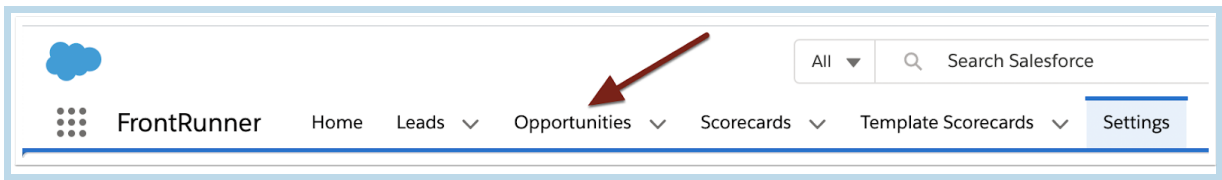
Click on the **Scorecards** tab.



The Scorecards Component should be visible as highlighted in the following screenshot.



Repeat the above steps to verify that FrontRunner Administrators can view the Scorecards component on Opportunity record pages. Start by clicking the **Opportunities** tab.

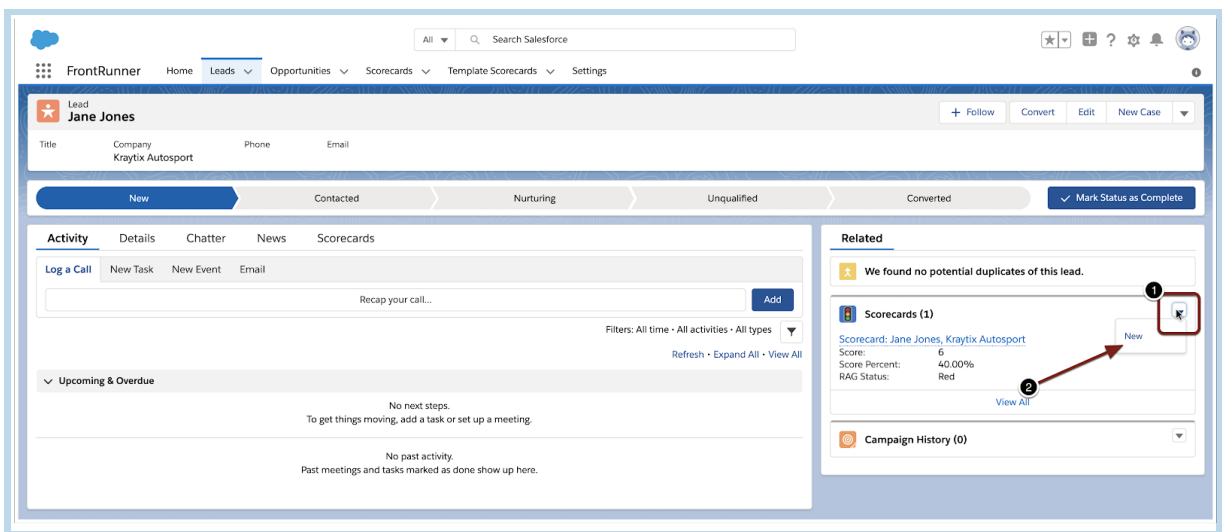


9.1.6 Verify Scorecard Create

To verify that FrontRunner Administrators can create Scorecards that are attached to Lead records, follow the steps in the above section 9.1.3 'Verify Scorecards Related List'.

Then perform the following steps:

1. Click the **action menu** in the Scorecards related list
2. Click the **New** menu item



The **New Scorecard** page should be displayed as below. Keep the default values and click the **Save** button:

FrontRunner Home Leads Opportunities Scorecards Template Scorecards Settings

Scorecard Edit
New Scorecard

Save Cancel

Lead or Opportunity

1. Associate the Scorecard with a Lead or Opportunity (but not both).

Lead Jane Jones

Opportunity

Template Scorecard

2. Select a Template Scorecard to create the new Scorecard from.

Select	Template Scorecard Name	Description
☐	BANT	
☐	SCOTSMAN	
☒	MAN	

Scorecard Name

3. Give the Scorecard a name.

Scorecard Name Scorecard: Jane Jones, Kraytix Autosport

Save Cancel

The following page should be displayed without any errors, verifying that a FrontRunner Administrator can create Scorecards:

FrontRunner Home Leads Opportunities Scorecards Template Scorecards Settings

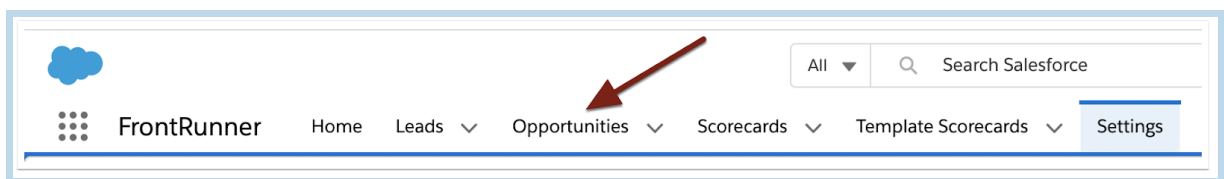
Scorecard
Scorecard: Jane Jones, Kraytix Autosport

Back to parent Lead

Status	Trend	Detail
Money	Does the customer have a budget for this opportunity?	Criteria Outcome Criteria Score Week - 1 Week - 2 Week - 3 Week - 4
Authority	Do we know who has the authority to make the purchase?	0% 0% 0% 0%
Need	Do we know why the customer needs to make this purchase?	0% 0% 0% 0%

Scorecard Score: 0%

Repeat the above steps for an Opportunity record to verify that FrontRunner Administrators can create Scorecards that are then attached to Opportunity records. Start by clicking the **Opportunities** tab.

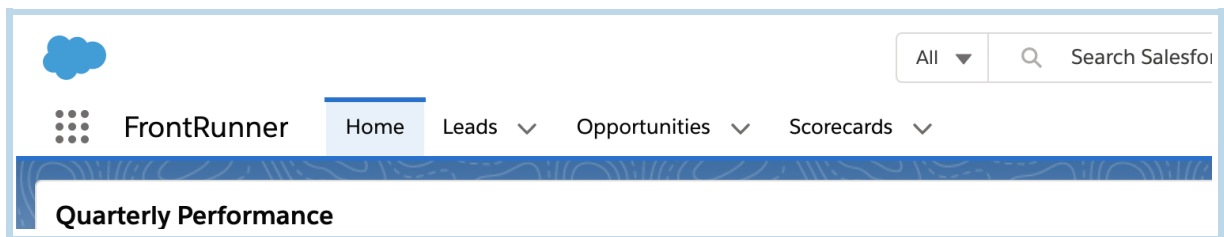


9.2 FrontRunner User Verification

To verify that FrontRunner Users have been setup correctly, login to the Jim Brown user account.

9.2.1 Verify Tab Access

If FrontRunner Users have been configured with access to the correct FrontRunner app tabs, the tabs should look like the following:



9.2.2 Verify Scorecards Related List

To verify that FrontRunner Users can view the Scorecards related list on Lead and Opportunity records, follow the steps outlined in section 9.1.3 'Verify Scorecards Related List' whilst logged in as Jim Brown.

9.2.3 Verify Scorecards Inline Pages (Optional for Salesforce Classic)

To verify that FrontRunner Users can view the Scorecards inline page on Lead and Opportunity records when in Salesforce Classic, follow the steps outlined in section 9.1.4 'Verify Scorecards Inline Pages (Optional for Salesforce Classic)' whilst logged in as Jim Brown.

9.2.4 Verify Scorecards Component (Optional for Salesforce Lightning Experience)

To verify that FrontRunner Users can view the Scorecards component on a Lead and Opportunity Lightning Record Page in Salesforce Lightning Experience, follow the steps outlined in section 9.1.5 'Verify Scorecards Component (Optional for Salesforce Lightning Experience)' whilst logged in as Jim Brown.

9.2.5 Verify Scorecard Create

To verify that FrontRunner Users can create Scorecards, follow the steps outlined in section 9.1.6 'Verify Scorecard Create' whilst logged in as Jim Brown.